

MANAGEMENT AND INVESTMENT OF FUNDS

This investment policy is adopted in accordance with the provisions of applicable law by the board of education. This policy sets forth the investment policy for the management of the public funds of the district. The policy is designed to ensure prudent management of public funds, the availability of funds when needed, and reasonable investment returns.

Investment Authority

The district treasurer is required by the board of education to invest district monies in the custody of the treasurer in those investments permitted by law. The treasurer shall, to the extent practicable, use competitive bids when purchasing direct obligations of the United States Government or other obligations of the United States Government, its agencies, or instrumentalities.

The district treasurer shall limit investments to:

1. Direct obligations of the United States Government to the payment of which the full faith and credit of the Government of the United States is pledged; provided the district treasurer, after completion of an investment education program in compliance with applicable law, may invest funds in the investment account in other obligations of the United States Government, its agencies or instrumentalities;
2. Obligations to the payment of which the full faith and credit of this state is pledged;
3. Certificates of deposits of banks when such certificates of deposits are secured by acceptable collateral as in the deposit of other public monies;
4. Savings accounts or savings certificates of savings and loan associations to the extent that such accounts or certificates are fully insured by the Federal Savings and Loan Insurance Corporation;
5. Repurchase agreements that have underlying collateral consisting of those items specified in paragraphs 1 and 2 above including obligations of the United States, its agencies and instrumentalities, and where the collateral has been deposited with a trustee or custodian bank in an irrevocable trust or escrow account established for such purposes;
6. County, municipal or school district direct debt obligations for which an ad valorem tax may be levied or bond and revenue anticipation notes, money judgments against such county, municipality or school district ordered by a court of record or bonds or bond and revenue anticipation notes issued by a

public trust for which such county, municipality or school district is a beneficiary thereof. All collateral pledged to secure public funds shall be valued at no more than market value;

7. Money market mutual funds regulated by the Securities and Exchange Commission and which investments consist of obligations of the United States, its agencies and instrumentalities, and investments in those items and those restrictions specified in paragraphs 1 through 6 above;
8. Warrants, bonds or judgments of the district;
9. Qualified pooled investment programs through an interlocal cooperative agreement formed pursuant to applicable law and to which the board of education has voted to be a member, the investments of which consist of those items specified in paragraphs 1 through 8 above, as well as obligations of the United States agencies and instrumentalities;
10. Investment programs administered by the state treasurer; or
11. Any other investment that is authorized by law.

Investment Philosophy

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

Liquidity

Available funds will be invested to the fullest extent practicable in interest-bearing investments or accounts, with the investment portfolio remaining sufficiently liquid to meet reasonably anticipated operating requirements.

Diversification

The investment portfolio will be reasonably diversified so as to avoid any one investment having a disproportionate impact on the portfolio. Provided this restriction will not apply to securities of the United States Treasury backed by the full faith and credit of the United States Government.

Safety Of Principal

Although investments are made to produce income for the district, investments will be made in a manner that preserves principal and liquidity.

Yield

The portfolio will be designed to attain maximum yield within each class of investment instrument, consistent with the safety of the funds invested and taking into account investment risk and liquidity needs.

Maturity

Investments may have maturities extending to 12 months, provided sufficient liquidity is available to meet major outlays, and except that general fund investments may not exceed 3 months.

Quality Of The Instrument And Capability Of Investment Management

The superintendent shall be responsible for seeing that the treasurer and any assistant treasurer are qualified and capable of managing the investment portfolio and satisfactorily complete any investment education programs required by state law or by the board of education.

Safekeeping And Custody

The treasurer will maintain a list of the financial institutions and pooled investment programs governed by an interlocal cooperative agreement formed pursuant to OKLA. STAT. tit. 70 § 5-117b which are authorized to provide investment services, and will maintain a separate list of financial institutions with collateral pledged in the name of the district.

1. Securities purchased from a bank or dealer, including any collateral required by state law for a particular investment, shall be placed under an independent third party custodial agreement. The Trust Department of a financial institution will be considered to be independent from the financial institution.
2. All securities will be in book entry form, and physical delivery of securities will be avoided.
3. Telephone transactions may be conducted, but such transactions must be supported by written confirmation, which may be made by way of a facsimile on letterhead with authorized signatures of the safekeeping institution.
4. Written transactions and confirmations of transactions by computer connections will be kept in the treasurer's office.

Reporting And Review Of Investments

The treasurer will prepare an investment report to be submitted to the board of education on at least a monthly basis. The report will include:

1. A list of individual securities held at the end of the reporting period.
2. The purchase and maturity dates of these securities.
3. The name and fund for these securities.

4. The yield rate of these securities.
5. Any collateral pledged by a custodian.

The board of education shall review the treasurer's investment performance on a regular basis that is no less frequent than monthly.

Depositing Of Interest

Unless otherwise directed by the board of education through policy or by special directive, by the Oklahoma Constitution, or by the federal government, income earned from the investment of non-activity funds shall be deposited in the general fund, and income earned from the investment of activity funds shall be deposited as directed by the board of education.

EMPLOYEE FUNDRAISING

The board prefers to limit fundraising and seeks to provide all necessary furniture and supplies for district use. This practice safeguards standardization throughout the district's programs, allows for appropriate oversight of activity funds, and ensures the district meets its obligations for equity in its programs.

The board also acknowledges that fundraising is a reasonable way to pay for special projects and activities. In order to ensure that fundraising efforts do not inadvertently impede the district's overall financial plans or create disorder within the district, the board will annually approve a fundraising schedule at the beginning of the school year. The board may also approve additional fundraising throughout the year as it deems appropriate.

Any employee who wishes to conduct fundraising apart from the master schedule must obtain prior approval from the board. This approval may be sought by submitting a request for board consideration to the Chief Financial Officer. The Chief Financial Officer has full discretion in determining whether to bring a fundraising request before the board.

Unless the board grants authorization, no employee may solicit donations for any purpose connected with the school. This prohibition includes, but is not limited to: raffles, any type of sale (bake sales, rummage sales, etc.), requests for donations, and/or the use of crowdfunding websites (GoFundMe.com, DonorsChoose.org, etc.).

Any employee who is granted authorization to engage in fundraising activities must adhere to all requirements established by the Chief Financial Officer. These requirements include but are not limited to identifying:

- the group or activity benefitting from the funds
- the individuals who will participate in the fundraiser, including the school site involved
- the type of fundraiser, including specific products or services to be sold, auctioned, etc.
- the proposed dates for the fundraiser
- the employee who will oversee the fundraiser
- the estimated amount of revenue to be generated per unit and in total
- the procedural safeguards to be utilized to ensure the security of all funds

- whether the activity complies with the district's wellness policy or would use one of the site's exceptions.

The Chief Financial Officer is responsible for updating the board at each of its meetings regarding any fundraising activities apart from the board's master schedule.

PUBLIC GIFTS TO THE SCHOOLS

The board of education assumes responsibility, within its financial capabilities, for providing at public expense all items of equipment, supplies and services that may be required in the schools under its jurisdiction. Gifts, grants or bequests will be accepted and the action recorded, provided the conditions of acceptance do not remove any degree of control of the district from the board and will not cause inequitable treatment of any student(s) or student group(s).

Propositions giving funds, equipment or materials to the school with a “matching agreement” or restriction are generally not acceptable. Acceptance of donated equipment or materials may depend upon compliance with the board’s policy of standardizing materials and equipment in the district, which could restrict gifts purchased by parent-teacher organizations to individual schools. The acceptance of a gift for a particular school, however, indicates the board’s approval of the use the benefactor specified.

Any person or organization desiring to give a gift or make a grant or a bequest to the board should contact the superintendent, who may accept the gift, thank the donor, and inform the board, except that offers of real property will be accepted only by the board. Also, where the appropriateness of a gift is in doubt, the superintendent will refer the matter to the board for its acceptance or rejection. For example, single gifts of considerable value exhibiting the donor’s name or business shall be considered on an individual basis by the board.

All conditional gifts must be approved by the board.

Any gift or grant accepted by the board or the superintendent as its executive officer will become the property of the board of education and will comply with all state and federal laws, including but not limited to the rules outlined in the FCC’s 6th Report and Order. Specifically, E-Rate applicants are prohibited from soliciting or accepting any gift or other thing of value from a service provider participating in or seeking to participate in the E-Rate program. It is a violation for any service provider to offer or provide any gift or other thing of value to those personnel of eligible entities involved with the E-Rate program.

MUSKOGEE PUBLIC SCHOOLS
BOARD OF EDUCATION POLICY

Business and Auxiliary Services
103040

Adopted: August 20, 2019

ANNUAL STATISTICAL/FINANCIAL REPORTS

The board of education will make annual statistical and financial reports to the State Board of Education in a timely manner. The statistical report will be made as of June 30. Each of such reports will be filed with the State Board of Education as soon as information is available following the effective date of such reports.

Reference: 70 OKLA. STAT. §5-128

SURETY BONDS FOR SUPERINTENDENT AND FINANCIAL OFFICERS

The superintendent and any financial officer of the district are required to furnish a surety bond in the penal sum of not less than One Hundred Thousand Dollars (\$100,000.00) or an amount otherwise set by law or set by the State Board of Education to assure the faithful performance of the duties of the superintendent and financial officers.

The board finds that a reasonable definition of “financial officer” is any person whose job description or board policy or practice requires that he or she supervise or handle monetary receipts or disbursements on a reasonably consistent basis and any person who has oversight of funds or who actually transacts financial business on behalf of the district. In accord with this definition the board defines “financial officers” to include the individuals holding in whole or in part the following positions or their functional equivalent: chief financial or business officer, encumbrance clerk, payroll clerk, treasurer, assistant treasurer, or activity fund custodian. Provided however, the bonding requirements of this policy shall not apply to the treasurer which requirements are specifically governed by OKLA. STAT. tit. 70, §5-115 (1991).

The requirement as to the terms, conditions, penalty, amount or quality or type of surety shall be deemed to mean the furnishing of a separate bond or surety contract for each individual officer or employee, or the furnishing of a “blanket bond”. The latter means a school district officer and employees blanket position bond which covers all officers and employees up to the penalty of the bond for each officer and employee and the full penalty of the bond is always enforced during its term and no restoration is necessary and there is no additional premium after a loss is paid.

The surety bonds required by §5-116a shall be furnished by a company duly qualified under the insurance laws of Oklahoma and shall be purchased by the district. Each surety bond shall be payable to the district and require “financial officers” and the superintendent to faithfully perform their duties during their employment or term of office and properly account for all monies and property received by virtue of their position or employment.

In the event of a conflict between this policy and any opinion of a court of competent jurisdiction or an opinion of the Oklahoma Attorney General regarding who constitutes a “financial officer” of the district, the opinion will be deemed to control over any contradictory definition in this policy.

Reference: 70 OKLA. STAT. §5-116a

ACTIVITY FUNDS

The board of education will exercise complete control over all activity funds and will adopt appropriate rules and regulations for handling, expending and accounting for all such funds.

At the beginning of each fiscal year, the board will approve all school activity fund subaccounts, all subaccount fund raising activities and all purposes for which the monies collected in each subaccount can be expended. The board will approve any activity fund raising events during the fiscal year.

The superintendent will cause the activity account to be audited annually by a certified public accountant who will be selected by the board. The audit will be furnished to the board, and the cost of the audit will be paid from the general fund.

No expenditures will be made from activity funds except by check and on the authorization of the sponsor of the group to whom the fund belongs. All such checks are to be issued and signed by the custodian of the activity fund and countersigned by a person designated by the board.

All activity monies will be deposited with the office of the superintendent. The custodian of such funds will cause the funds to be deposited daily with the central office.

The superintendent will cause to be kept complete and accurate accounts of all activity funds and will see that monthly reports are made to appropriate parties.

The school activity fund custodian will be appointed by the board of education. The custodian will provide a surety bond in an amount determined by the board, but not less than one thousand dollars (\$1,000.00).

These provisions will not apply to funds collected by student achievement programs or parent-teacher associations and organizations that are sanctioned by the board of education.

Reference: 70 OKLA. STAT. §5-129

FEDERAL PROGRAM COMPLAINTS

The district receives federal funds and the board has established this policy to help ensure compliance with federal grant requirements. Any student, parent, community member or employee who believes the district has violated any regulation connected with the expenditure of federal funds should notify the district using the process outlined in this policy. This policy specifically covers, but is not limited to, complaints related to the following issues:

- Use of Title I funds
- Flexible Learning Program
- Parental involvement
- Private school access to federal funds
- Homeless student enrollment, transportation and barriers to education
- Teacher and principal training and recruiting
- Math and science partnerships
- Enhancing education with technology
- English language acquisition
- Safe and drug free schools
- Community learning centers
- Innovative programs
- Small, rural, and/or low-income school programs

Definitions

Grievance Coordinator:

The person designated to process complaints, moderate and keep records during hearings. The grievance coordinator is:

Chief Academic Officer
Muskogee Public Schools

202 West Broadway
Muskogee, OK 74401

Grievant:

The person making the complaint.

Respondent:

The person alleged to be responsible for the improper activity contained in the complaint. The term may be used to designate persons with responsibility for a particular action or those persons with supervisory responsibility for procedures and policies in those areas covered in the complaint.

Day:

Day means a working day when the district's main administrative offices are open. The calculation of days shall exclude Saturdays, Sundays and legal holidays.

Procedural Steps

Step 1:

Address the problem informally. Prior to filing a written complaint, individuals are encouraged to visit with the responsible party or a school administrator and make reasonable efforts to resolve the problem. School employees are required to participate in this process.

Step 2:

If the problem was not resolved informally, or if a parent, student or patron believes informal resolution is not advisable, the grievant may submit a complaint to the grievance coordinator on the attached form. The form must contain all the requested information.

The grievance coordinator will conduct an impartial investigation within ten (10) days of receipt of the complaint (or as soon as reasonably possible given the circumstances, but not more than thirty (30) days). The investigation will include, but not be limited to, interviewing the grievant, respondent, and witnesses, and reviewing relevant documents. The grievance coordinator will specifically ask the respondent to confirm or deny facts, accept or reject the grievant's requested action, and outline alternatives.

After the investigation, the grievance coordinator will prepare a written decision regarding the results of the investigation. The decision will be mailed to the grievant, respondent, and superintendent within five (5) days of the conclusion of the investigation.

Step 3:

If either the grievant or respondent are dissatisfied with the step 2 decision, he or she may appeal. The grievance coordinator must receive a written notice of appeal within five (5) days of the appealing party's receipt of the step 2 decision or the matter is deemed resolved. The appeal notice must include a specific statement explaining the basis for the appeal.

Within five (5) days of receipt of a timely appeal, the grievance coordinator will refer the matter to the superintendent (or other impartial individual if the superintendent is the respondent).

The superintendent (or other impartial individual if the superintendent is the respondent) will conduct a hearing within ten (10) days of his/her receipt of the appeal. The grievant, respondent and grievance coordinator will all be invited to attend the appeal hearing, and relevant employees are required to participate in this process.

At the hearing, the superintendent (or other impartial individual if the superintendent is the respondent) will review the information collected through the investigation and may ask for additional oral or written evidence from the parties and any other individual he/she deems relevant. The grievance coordinator will make arrangements to audiotape any oral evidence presented.

After the investigation, the superintendent (or other impartial individual if the superintendent is the respondent) will prepare a written decision regarding his/her findings. The decision will be mailed to the grievant, respondent, and grievance coordinator within five (5) days of the conclusion of the appeal hearing.

Step 4:

If either the grievant or respondent are dissatisfied with the step 3 decision, he or she may appeal. The grievance coordinator must receive a written notice of appeal within five (5) days of the appealing party's receipt of the step 3 decision or the matter is deemed resolved. The appeal notice must include a specific statement explaining the basis for the appeal.

Within five (5) days of receipt of a timely appeal, the grievance coordinator will notify the board of education clerk. The board will conduct a hearing within thirty (30) days of the clerk's receipt of the appeal. The grievant, respondent and grievance coordinator will all be invited to attend the appeal hearing, and relevant employees are required to participate in this process.

At the hearing, the board may ask for oral and written evidence to be presented by both parties. The board clerk will make arrangements to audiotape any oral evidence presented.

After the hearing, the board clerk will prepare a written decision regarding the board's findings. The decision will be mailed to the grievant, respondent, grievance coordinator, and general counsel of the Oklahoma State Department of Education within five (5) days of the conclusion of the appeal hearing. The board's decision

may be appealed by submitting a request to the Oklahoma State Department of Education's general counsel within thirty-five (35) days of the board hearing .

General Provisions

Extension of time:

Any time limits set by these procedures may be extended by mutual consent of the parties involved, although the total number of days from the date the complaint is filed until the board of education issues a final decision shall not exceed one hundred twenty (120) days.

Confidentiality of Records:

Complaint records will remain confidential, to the extent allowed by law, unless permission is given by the parties involved to release such information. All complaint records will be kept separate from any other records of the district. No complaint record shall be entered in any personnel file unless adverse employment action is taken against an employee. Complaint records shall be maintained on file for three years after complaint resolution.

Representation:

The grievant and the respondent may have a representative assist them through the grievance process and accompany them to any hearing.

Retaliation:

The district prohibits retaliation, intimidation, threats, or coercion related to any aspect of the grievance process, including but not limited to: making a complaint, testifying, assisting, appealing, or participating in any other proceeding or hearing. The district will take steps to prevent retaliation. These steps include notifying students and employees that they are protected from retaliation, making sure grievants know how to report future problems and making follow-up inquiries to see if there have been any new incidents. If retaliation occurs, the district will take strong responsive action.

Basis of Decision:

At each step in the grievance procedure, the decisionmaker will take or recommend appropriate measures based on the facts taken as a whole, as revealed by the investigation and hearing, and the totality of the circumstances, such as the nature, extent, context and gravity of the activities or incidents.

FEDERAL PROGRAMS

The district participates in a variety of federal programs and receives funding (“Awards”) through those programs. All district representatives will comply with all regulatory guidance and laws applicable to the individual programs.

The district will regularly monitor its compliance efforts and make appropriate information available to the federal awarding agency (“FAA”), state pass-through entity (“State Entity”), inspectors general, and/or US comptroller. The district will make required performance reports using OMB approved information collections reports.

Audits

If the district expends \$750,000 or more in federal awards during the fiscal year, it will have an audit conducted.

Employee Compensation

Regardless of the source of the funds, employees are paid pursuant to the district’s salary schedule for all work performed. If personnel costs are paid with Awards, those costs will be calculated as wages and fringe benefits permitted in 2 C.F.R. § 200.431 for services rendered during the relevant time period.

Employees who are paid with Award funds – in whole or in part - must maintain adequate records documenting the time spent performing each set of duties so that their compensation can be correctly allocated to the Award. 2 C.F.R. § 200.430

Travel and Conference Expenses

The district will follow its standard travel reimbursement and professional development policies and procedures when spending Award funds, except when a federal requirement is more stringent, in which case the district will adhere to the more stringent requirement. Any travel, conference / professional development participation and expenses will be reasonable, necessary, and related to the federal program tied to the Award.

Conflict of Interest / Mandatory Disclosure Regarding Contracting

The district will make written disclosure of any potential conflict of interest to the FAA or State Entity in accordance with the FAA's policy.

All members of the board, officers, employees and agents of the district are expected to maintain high ethical standards and use good judgment in conducting school business. Board members are also required to follow the same standards of professional conduct required of all district employees. Board members, officers, employees and agents of the district specifically agree to refrain from using their position for any unfair personal or business advantage or engaging in any action which gives the appearance of such misconduct. Any board member who violates this policy will be subject to censure by the board, may be referred to the Oklahoma Ethics Commission, and may also be referred for criminal prosecution. Any officer, employee or agent of the district will be subject to disciplinary action, including but not limited to termination and/or prosecution for violation of the requirements related to standards of conduct and conflict of interest.

Business Arrangements and Financial Transactions

All board members are required to familiarize themselves with and comply with all the requirements of OKLA. STAT. tit. 70 § 5-124.

As required by law, the district will not contract with any member of the board or any company, individual or business concern in which any member of the board is directly or indirectly interested. A member of the board is considered to be interested in any contract with a company, individual or business concern if the member of the board or any member of the immediate family (including a partner) of the member of the board owns any substantial interest in the same, or if an organization employs or is about to employ one of these parties. The only exceptions will be those allowed by OKLA. STAT. tit. 70 § 5-124.

If a contract is allowed by an exception listed in OKLA. STAT. tit. 70 § 5-124, then the board will not give special consideration to any company based on its affiliation with a board member or a board member's family or partner. If the board is seeking to conduct business with a company affiliated with a board member (or a board member's family member or partner) that member will abstain from the contracting process unless a statutory exception applies.

Gifts

Board members may not seek or accept gifts, payments, services, entertainment, travel, valuable privileges, etc. from individuals or vendors who do business or seek to do business with the district, although board members may accept common courtesies such as meals and promotional items as are customarily exchanged in the normal course of business. These courtesies must be of nominal value only. Board members are expected to use good judgment in accepting such courtesies and must avoid any conflict of interest or even the appearance of impropriety.

Reporting Misconduct

In the event a board member engages in misconduct such as fraud, bribery, or gratuity violations, the board president, or the vice president if the president is the board member engaging in the misconduct, will report the violation to the FAA or State Entity in order to help prevent or prosecute waste, fraud, and abuse.

Financial Management Procedures

Internal Controls

Chief Academic Officer is responsible for implementing appropriate internal controls over Award funds which are consistent with 2 C.F.R. Part 200 Subpart E. This includes, but is not limited to, reviewing and comparing Awards, budgets, and allocations to determine whether the Awards are being expended appropriately and in compliance with relevant guidelines. Chief Academic Officer is also responsible for taking prompt action if noncompliance is discovered. Chief Academic Officer is required to take reasonable measures to safeguard protected personally identifiable and protected information.

General Recordkeeping

The district will expend all Awards and account for those Awards in accordance with all applicable laws and regulations. Chief Academic Officer is responsible for maintaining appropriate records, documentation, and oversight related to all Awards. This includes, but is not limited to the following:

- information to prepare all required reports
- compliance documentation to establish conformity with federal statutes, regulations, and the specific terms and conditions of an Award
- proof of the appropriate expenditure of Awards
- records of receipt / expenditure of Awards, including the federal program under which the Award was made, any applicable CFDA number, Award identification number and year, name of the FAA, and name of any applicable State Entity
- accurate, current, and complete disclosure of the financial results of all Awards in accordance with current OMB standards and the terms of the Award
- source documents showing the application for funds, authorizations, obligations, unobligated balances, assets, expenditures, and income and interest related to an Award
- evidence that all Award funds, property, and other assets have been safeguarded and are used solely for authorized purposes
- a comparison of Award expenditures and budgets

- the district's written procedures to minimize the elapsed time between the transfer of funds and disbursement by the district, when possible, to receive funds in advance from the FAA
- the district's written procedures for determining the allowability of costs in accordance with 2 CFR part 200 subpart E and the terms and conditions of the Award

Records Retention Timeline

The district will maintain all records pertinent to any Awards it receives. All documents will be maintained a minimum of 3 years from the date of submission of the final expenditure report OR 3 years from the date of the quarterly or annual financial report UNLESS there are pending claims related to project OR the FAA has notified the district the records should be maintained longer OR the records have been transferred to or are maintained by the FAA or State Entity. The district will retain records for real property and equipment maintained for 3 years after final disposition.

Interest

Chief Academic Officer is responsible for maintaining advance Award payments in an interest bearing account unless:

- the district receives less than \$120,000 in Awards per year
- the district would earn less than \$500 per year in interest on federal cash balances
- the depository would require an unfeasible minimum balance
- the banking system prohibits interest bearing accounts

Chief Academic Officer is responsible for retaining up to \$500 per year of interest earned on Awards for the district to utilize for administrative expenses. Chief Academic Officer is responsible for remitting any additional earned interest to the Department of Health and Human Services Payment Management System.

Budgeting

Chief Academic Officer is responsible for regularly reviewing budgets and expenses and making appropriate reports and requests for deviations in the budget or project scope.

Real Property, Equipment, and Supplies

The district will appropriately insure all real property, equipment, and supplies ("Property") acquired or improved with Awards, and will take reasonable steps to safeguard and adequately maintain the Property. All Property will be labeled.

The district will not encumber Property acquired or improved with an Award without prior approval from the FAA.

The district will maintain appropriate records of the Property. These records will include, as applicable, a description, serial/identification number, source of funding (including the Federal Award Identification Number), name of title holder, acquisition date, cost, percentage of federal participation in the project's cost, location, use and condition, disposition data (including date of disposal and sale price).

The district will conduct an inventory of Property at least every 2 years, and will review/update the inventory annually. The district will include the following information on the inventory: fund source, description, serial number, acquisition date, acquisition cost, and location.

The district will use the Property as long as needed, and may make the Property available for other federal projects as long as this will not disrupt the intended use.

Once the Property is no longer needed, it will be disposed of in accordance with current federal standards.

Property purchased for a Title I, Part A Targeted Assistance program will be reserved only for identified students.

General Procurement Standards and Vendor Selection

General Standards

The district will follow its standard procurement policies and procedures when spending Award funds, except when a federal requirement is more stringent, in which case the district will adhere to the more stringent requirement. Chief Academic Officer is responsible for overseeing that contractors perform in accordance with the terms of their contracts / purchase orders.

Any employee who has oversight or compliance responsibilities for administering an Award will comply with the district's stated conflict of interest policy above.

The district will use processes and analysis designed to avoid acquiring unnecessary and duplicative items and will actively attempt to make economical purchases with Award funds. This may include, when appropriate, consideration of leases, shared service agreements, use of federal excess and surplus property, and value engineering clauses in construction contracts.

The district will only award contracts to responsible contractors possessing the ability to successfully perform. In determining whether a contractor is a responsible contractor, the district will consider integrity, compliance with public policy, record of past performance, and financial and technical resources.

The district will maintain adequate records detailing the history of procurement, including the rationale for the procurement method, selection of the contract type, contractor selection or rejection, and the basis for the contract price for all Awards.

In procurement with Awards, the district will only use time and material type contracts after determining that no other contract is suitable and if the contract includes a ceiling price that the contractor exceeds at its own risk. If such a contract is used, the district will utilize extra oversight on the project.

The district will utilize good practices and sound business judgment to settle all procurement issues related to Awards, including source evaluations, protests, disputes, and claims.

Procurement Methods

For procurement processes with Award funds, the district will make technical specifications on proposed procurements available to the FAA or State Entity if requested.

All contracts connected with an Award will comply with 2 C.F.R. §200.318-.326.

For all procurements using funds from an Award, the district will utilize one of the procurement methods identified below:

- Micro-purchase will be utilized for purchases under \$10,000 (or \$2,000 if the purchase is subject to the Davis-Bacon Act). The district will attempt to distribute these purchases equitably among qualified suppliers, and the district will not solicit competitive quotations if the district believes a purchase price is reasonable.
- Small purchase procedures will be utilized for purchases under the Simplified Acquisition Threshold (\$250,000). When utilizing this procurement method the district will obtain quotes from an adequate number of qualified sources.
- Sealed bids will be utilized when complete, adequate, and realistic specifications are available, multiple bidders are willing and able to compete effectively for the business and the procurement lends itself to a firm fixed price and the successful bidder can be made principally on the basis of price. When utilizing this procurement method, the district will timely and publicly issue the invitation for bids - including adequate information about the project. All the bids will be publicly opened as prescribed in the invitation for bids, and the contract will be awarded in writing to the lowest responsible bidder. If a sealed bid is rejected, the district will document the reason for the rejection.
- Competitive proposals will be utilized when other procurement methods are not appropriate. The first step of the competitive proposal process is getting an independent estimate. When utilizing this procurement method, the district will publicize the evaluation factors and their relative importance to an adequate number of qualified sources and will consider all responses. The district will use an established, written method for conducting technical evaluations of the proposals (including receiving independent estimates before receiving bids or proposals) and award the project to the proposal which is most advantageous to the district.

The district may also use competitive proposals for qualifications-based procurement of architectural/engineering (A/E) services to award proposals to the most qualified competitor – subject to fair and reasonable compensation. The district will not use this type of procurement to purchase other types of services through A/E firms.

- Noncompetitive proposals will be utilized when an item is only available from a single source, there is an urgent situation which precludes the delays associated with competitive selection, the FAA or State Entity has expressly authorized this method, or solicitation from multiple sources has yielded inadequate competition.
- Negotiating Profit will be negotiated as a separate element of the price for each contract if there is no price competition and in all cases where cost analysis is performed.

For all procurements using funds from an Award, the district:

- will not utilize a cost plus a percentage of cost or percentage of construction cost method of contracting
- will not accept bids or proposals from a contractor that develops or drafts specifications, requirements, statements of work, invitations for bids, or similar documents
- will not unnecessarily restrict bidders to a specific geographic area
- will ensure that if a list of prequalified persons, firms or products are used, that the list is current and includes enough qualified sources to ensure maximum open and free competition
- will take appropriate affirmative steps to ensure that small and minority businesses, women's business enterprises, and labor surplus area firms ("target groups") are included in its contracting process, including:
 - including target groups on the solicitation list and ensure that these target groups are solicited whenever they are potential sources
 - dividing total requirements, if economically feasible, to permit maximum participation by target groups
 - establishing delivery schedules, when possible, which encourage target groups to participate
 - utilizing groups which interface with the target groups (e.g., Small Business Administration, Minority Business Development Agency of the Department of Commerce, etc.)
 - requiring the prime contractor, if using subcontracts, to take these same affirmative steps to include target groups

- ensuring the district and all its contractors comply with the with § 6002 of the Solid Waste Disposal Act, including procuring only items which contain the highest percentage of recovered materials practicable for purchases over \$10,000, procuring solid waste management services which maximize energy and resource recovery, and establishing an affirmative procurement program for procuring recovered materials identified in EPA guidelines

Suspension and Debarment

The following language shall be included within the terms of any contract for goods and services that will be paid for using federal funding:

Certification Regarding Debarment, Suspension and Ineligibility

To the best of its knowledge and belief, the contractor or any of its principals are not presently debarred, suspended, proposed for debarment or otherwise declared ineligible for the award of contracts by any Federal agency by the inclusion of the contractor or its principals in the current "LIST OF PARTIES EXCLUDED FROM FEDERAL PROCUREMENT OR NONPROCUREMENT PROGRAMS" published by the U.S. General Services Administration Office of Acquisition Policy.

The prospective lower tier participant shall provide immediate written notice to the District if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances. Should the prospective lower tier participant enter into a covered transaction with another person at the next lower tier, the prospective lower tier participant agrees by accepting this agreement that it will verify that the person it intends to do business with is not excluded or disqualified.

SCHOOL RAFFLES

OKLA. STAT. tit. 21 § 1051 allows schools and their affiliated student groups and parent-teacher groups to raise money by conducting raffles in exchange for voluntary contributions. While this law allows for the issuance of raffle tickets in exchange for a *voluntary* contribution, the *sale* of raffle tickets is against the law and subjects such persons or groups selling the tickets to criminal liability. The district provides schools, student groups and parent-teacher groups with the option of conducting raffles. However, in order to comply with state law as well as prevent exploitation of students, parents and the community, the district requires that all such raffles be conducted within the limitations and guidelines provided below.

Groups Allowed to Conduct Raffles on School Property

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

Prior Approval of Raffles Required

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

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

General Requirements

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

voluntary contribution amount and may print this amount on the ticket as the suggested voluntary contribution.

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

No staff member or student shall be coerced or forced to participate in any raffle-related activity.

All tickets remain the responsibility of the sponsoring organization with accountability to the school's principal.

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

Information Printed on Tickets

The following information must be printed on the raffle ticket:

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

Records of Raffle Activity

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

1. Name of raffle winner(s) and respective prize(s), including the fair market value of the prize;
2. Total raffle tickets sold;
3. Total gross receipts;
4. Details of expenses related to the activity;
5. Net proceeds (gross proceeds minus expenses); and
6. Details of the expected use of the profits from the activity.

If the fair market value of the prize is \$600.00 or more, then the school must also obtain and keep for its records the social security number of the prize winner and his/her address.

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

Federal Taxation Issues

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

Form 1099's must be sent to the district's business office. Note that prizes with a fair market value of \$5000.00 or more are prohibited by the district.

Reference: 21 OKLA. STAT. §1051

EMPLOYEE TRAVEL EXPENSE REIMBURSEMENT

Statement of Policy

Expenses incurred by individuals for travel on behalf of the district should be reimbursed by the district. Reimbursement to individuals should be made upon approval by the board of education after proper presentation of supporting documentation, as defined below.

Definitions

Terms used in this policy are defined as follows:

1. "Travel" means transportation arrangements made or incurred by car, airplane, train, bus or other means or hotel accommodations and meals, for the purposes of advancing the interests of the district. Travel may be within or without the district. Travel does not mean transportation to and from the employee's residence or abode to the district for employment.
2. "Employee" means any person employed by the district or a member of the board acting in his or her capacity as a board member on behalf of the district.
3. "Non-employee" travel and related expense reimbursement is limited to reimbursement of students and sponsors, engaged in approved school related activities. Expenses eligible for reimbursement are only those for necessary meal and lodging expenses. Students and sponsors seeking reimbursement must follow the procedures included in this policy or any reimbursement will be forfeited.
4. "Expenses" means any actual indebtedness incurred and paid by an individual employee on behalf of the district, for the benefit of the district or for the purpose of advancing the interests of the district, with the intention of being reimbursed by the district.

Expenses may include, but are not limited to, these items:

- A. air, bus, taxi or train fares and car rentals;
- B. meals, unless payment is made on a per diem basis established by the board;
- C. hotel or motel accommodations;
- D. other travel related expenses when applicable, such as mileage; and

- E. registration fees and meeting expenses.
5. "Receipt" means an invoice document issued by a vendor which has been paid as an expense by an employee. A receipt must contain the following information:
- A. date indebtedness incurred;
 - B. date indebtedness paid;
 - C. amount paid;
 - D. amount of indebtedness;
 - E. who paid the indebtedness;
 - F. method of payment;
 - G. the purpose of the indebtedness including an itemized description of the goods or services purchased; and
 - H. the name, address and telephone number of the vendor.

A credit card slip alone is not a receipt.

6. "Supporting documentation" means a memorandum to the district's business office containing a request for reimbursement and explanation of the reason for the expense. All receipts for which reimbursement is sought and a travel claim must be attached to the memorandum.
7. "Travel claim" is a document prepared by an employee who seeks reimbursement which contains the following information:
- A. dates entering and ending travel status;
 - B. points of travel;
 - C. mileage to and from destination(s) when personally owned vehicle is used;
 - D. amount per mile reimbursed;
 - E. air, bus or train fares when public transportation is used;
 - F. parking fees, taxi fares, car rentals and turnpike fees;
 - G. meals or per diem rate established by the board of education, if any (an overnight stay is required for a per diem to be paid);
 - H. purpose, time, location and those in attendance for meals;

- I. motel and hotel expenses;
 - J. registration fees and meeting expenses;
 - K. other school business expenses such as telephone calls, tips, etc., which properly occur during the time an employee is in travel status;
 - L. encumbrance to be charged for expense; and
 - M. by whom the travel activity was approved.
8. "Credit card slip" is the customer's copy of the credit card charge form. A credit card slip alone is not a receipt. To qualify as a receipt a credit card slip must be attached to a supporting invoice issued by the vendor which contains all the information required of a receipt.
9. "Vendor" means the individual or entity that provided the goods or services to the district for which reimbursement is sought and a receipt for payment has been issued.
10. "Meals" means actual food expenses incurred while traveling outside the district or within the district if allowed by other board policies.

Procedure for Reimbursement

To obtain reimbursement for travel expenses the employee must:

1. Prepare supporting documentation to the District's Business Office with attached receipts and travel claims. Requests for reimbursement with insufficient or incomplete documentation will be denied.
2. Submit supporting documentation with attachments to the board encumbrance clerk. The board encumbrance clerk and Chief Financial Officer or his or her designee will review the memorandum and attachments for completeness and accuracy. If the memorandum is complete and accurate the board encumbrance clerk will advise the Chief Financial Officer to list the reimbursement request as an agenda item on the next available board meeting.
3. At the next available board meeting the board will consider the reimbursement request and authorize the board treasurer to issue a check to reimburse the employee for the amounts, if any, deemed appropriate by the board. The board has absolute discretion to deny the request or approve it in whole or in part. The board's decision is final.
4. The board treasurer will issue the checks for reimbursement authorized by the board as soon as is practicable following the board's action.

Other Issues

1. A request for reimbursement must be made within thirty (30) days after the vendor's invoice is issued. Notwithstanding this time limitation, all requests for reimbursement must be made prior to the end of the fiscal year in which the vendor's invoice was issued and services rendered, and it must be submitted in sufficient time to allow the board to take action at its last regular meeting of the fiscal year. Reimbursement requests not complying with these requirements will be denied unless unusual circumstances are presented to and approved by the board.
2. Reimbursements issued by the board are only for the actual amount of out of pocket expenses paid by the employee. No additional charges may be added by the employee and the employee may not obtain a check for funds he or she expects to pay or incur in the future.
3. An employee may elect a meal expense per diem in lieu of reimbursement for actual out-of-pocket meal expenses in an amount equal to the per diem allowance authorized by law for state employees in OKLA. STAT. tit. 74 § 500.8. The Chief Financial Officer shall, upon request, provide any district employee with a copy of the current provisions of OKLA. STAT. tit. 74 § 500.8 for review.
4. According to Internal Revenue Service regulations, meal reimbursements are to be reported as taxable income, unless the employee is required to work extensive hours requiring rest or incur overnight lodging, and there is a substantiated business connection. When meal reimbursements are determined to be taxable, the district is required to withhold Federal income tax, social security (FICA) and Medicare tax and to pay matching employer contributions for FICA and Medicare tax. Non-overnight meal reimbursement will be treated as non-taxable provided a substantial business discussion occurs during the meal and the meal is furnished for a substantial noncompensatory business reason. When seeking reimbursement for business related meals, employees must document the purpose of the meeting, the time, location and who was in attendance. Reimbursement of any taxable non-overnight meals will be paid in the employee's next regularly scheduled paycheck.
5. Any interpretation of this policy shall be made solely by the board of education and shall be binding in all respects.
6. Violation of any of the provisions of this policy may result in dismissal, nonrenewal, or other adverse action.

Reference: 70 OKLA. STAT. §5-117

REIMBURSEMENT FOR COCURRICULAR ACTIVITY EXPENSES

Statement of Policy

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

Definitions

Terms used in this policy are defined as follows:

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

A credit card slip alone is not a receipt.

5. "Supporting documentation" means a memorandum containing a request for reimbursement and explanation of the reason for the expense. All receipts for which reimbursement is sought and a claim must be attached to the memorandum.

6. "Claim" is a document prepared by a sponsor who seeks reimbursement which contains the following information:
 - A. a description of the authorized school-sponsored cocurricular activity;
 - B. date of authorization by the board of education;
 - C. meals;
 - D. motel and hotel expenses; and
 - E. encumbrance to be charged for expense.
7. "Credit card slip" is the customer's copy of the credit card charge form. A credit card slip alone is not a receipt. To qualify as a receipt a credit card slip must be attached to a supporting invoice issued by the vendor which contains all the information required of a receipt.
8. "Vendor" means the individual or entity that provided the goods or services to the sponsor or student for which reimbursement is sought and a receipt for payment has been issued.
9. "Meals" means actual food expenses incurred while participating in the authorized school-sponsored cocurricular activity.
10. "Authorized school-sponsored cocurricular activity" means participation in an event approved in advance by the board of education for a particular group of district students and their sponsor.

Procedure for Reimbursement

To obtain reimbursement for expenses the sponsor must:

1. Prepare and maintain complete and accurate supporting documentation with attached receipts and claims for the sponsor(s) and students. Requests for reimbursement with insufficient or incomplete documentation will be denied.
2. Submit supporting documentation with attachments to the designated district employee/official.
3. The board has absolute discretion to deny the request or approve it in whole or in part. The board's decision is final.
4. The district will issue payment for reimbursement authorized as soon as practicable following the approval.

Other Issues

1. A request for reimbursement must be made within thirty (30) days after the vendor's invoice is issued.
2. Reimbursements will be issued only for the actual amount of expenses paid by the sponsor(s) and the students. No additional charges will be

reimbursed. The district will not issue payment for funds a student or sponsor anticipates incurring in the future.

3. Reimbursement for necessary meal and lodging expenses incurred by district students and sponsors involved in authorized school-sponsored cocurricular activities may be made from the appropriate activity fund sub-account or from the general fund, as determined appropriate by the board of education.
4. Any interpretation of this policy shall be made solely by the board of education and shall be binding in all respects.
5. Violation of any of the provisions of this policy by a district employee/sponsor may result in dismissal or nonrenewal. Violation of the provisions of this policy by a student may result in disciplinary action.

Reference: 70 OKLA. STAT. §5-129

**STUDENT ACHIEVEMENT PROGRAMS AND PARENT-TEACHER
ASSOCIATIONS AND ORGANIZATIONS**

The board of education believes that student achievement programs (curricular, co-curricular and extracurricular) and parent-teacher associations and organizations can advance the educational goals of the board of education and confer a benefit to the students of the district. It is the purpose of this policy to establish guidelines for the sanctioning of student achievement programs and parent-teacher associations and organizations that raise money and collect revenues for the benefit of students. Only those student achievement programs and parent-teacher associations and organizations sanctioned in accordance with this policy will be exempt from the statutory controls over school activity funds found in the Oklahoma School Code, OKLA. STAT. tit. 70, § 5-129.

Sanctioning Procedure for Student Achievement Programs and Parent-Teacher Associations and Organizations

1. The district may sanction student achievement programs and parent-teacher associations and organizations that, according to the board's determination, advance the educational objectives of the district, are beneficial to students and meet the requirements of this policy.
2. In determining whether a student achievement program or a parent-teacher association or organization should be sanctioned by the district, the board of education may consider: (1) if the program, association, or organization promotes activities that are an extension, expansion, or application of the district curriculum; (2) if the program, association, or organization assists student government or activities in carrying out special projects or responsibilities; (3) if the program, association, or organization assists student clubs, organizations, and other student groups in raising funds to promote activities approved by the board of education; and (4) supplemental information provided by the student achievement program or by a parent-teacher association or organization in support of its application.
3. A written statement by a student achievement program or by a parent-teacher association or organization to the board of education requesting sanctioning shall include the following: (1) a statement of its purpose, goals, organizational structure, and membership requirements; (2) a detailed statement of how the district and its students will benefit if the organization is sanctioned; (3) a statement of nondiscrimination consistent with all Oklahoma and federal laws; and (4) financial and performance audits, if any, which have been performed on such program, association, or organization by an independent accounting firm.

4. The written statement shall be submitted to the superintendent for preliminary review. After the program, association, or organization's written statement has been reviewed by the superintendent, the superintendent shall make a recommendation to the board of education. The board of education shall review the written statement, and shall sanction or decline to sanction the applicant. The decision of the board of education is final and nonappealable.
5. In order to maintain the status of a sanctioned program, association, or organization in accordance with this policy, the superintendent of schools or the board of education may require from any such program, association or organization, on an annual basis, that financial and performance audits be performed on the program, association, or organization by an independent accounting firm. If required by the superintendent of schools or the board of education, the audits shall be submitted to the superintendent within ninety (90) days of the superintendent's request. The board of education shall review any audits submitted and determine if the program, association, or organization is entitled to continue to be sanctioned in accordance with this policy and if its funds should continue to be exempt from the statutory controls over student activity funds found in the Oklahoma School Code, OKLA. STAT. tit. 70, § 5-129.
6. The superintendent of schools or the board of education may, at any time they deem warranted, request copies of any and all records maintained by the program, organization, or association. Copies of records must be promptly provided upon the request of the board or superintendent.
7. The board may, at its discretion, withdraw sanctioning at any time it deems it in the best interest of the district. Any decision of the board of education to withdraw sanctioning is final and non-appealable.
8. No program, association or organization sanctioned under this policy shall publish or otherwise publicly indicate in any manner that it has been sanctioned by the district under this policy.

MUSKOGEE PUBLIC SCHOOLS
BOARD OF EDUCATION POLICY

Business and Auxiliary Services
103130

Adopted: August 20, 2019

AUDITOR

The board of education will provide for and cause to be made an annual audit of the district for each fiscal year. The audit will include a financial audit and a compliance audit of all district funds. Audits will be made at the end of each fiscal year at a minimum and may be required by the board at more frequent intervals.

A written report of the audit will be furnished to the board by the auditor. The board will conduct a final exit interview with the auditor at an open board meeting.

Reference: 70 OKLA. STAT. §22-103

PURCHASING AND DISTRIBUTION

It is the policy of the board of education that purchasing and distribution shall be under the supervision of the superintendent, but may be delegated in writing by the superintendent to a teacher. Written delegations of authority should contain specific limitations imposed by the board or superintendent upon the designee or may provide a complete delegation of purchasing and distribution duties. No person except the superintendent or the superintendent's designee shall make purchases without written authorization.

The superintendent should take advantage of discounts for buying in quantity and, if possible, purchase in sufficient quantities for one full school term. Requisitions for supplies shall follow the appropriate chain of command, originating from teachers to the superintendent. Purchases shall be made from local firms when economically wise to do so.

No expenditure involving an amount greater than \$500.00 shall be made except in accordance with a written contract or purchase order.

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

PROCUREMENT

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

Quotes/Requests for Proposals:

- Less than \$5,000 Shall be secured verbally. Purchase order may be approved by the superintendent or superintendent's designee.
- \$5,001 to \$15,000 Shall be obtained in written form from the supplier. Purchase order may be approved by superintendent or superintendent's designee.
- \$15,001 and over Shall be secured by sealed quotes or by formal request for proposal in accordance with specific procedures established by the superintendent. Purchase order or contract must be submitted to the board of education for approval before the award is made.

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

Bids

No contract involving an expenditure of more than \$100,000 (or any construction management trade contract or subcontract exceeding \$50,000) for the purpose of constructing a building or making any improvements or repairs to school buildings shall be made except upon sealed bids in accordance with the Public Competitive Bidding Act of 1974, OKLA. STAT. tit. 61, § 101 et seq. (the "Act"). No contract shall be split into two or more contracts involving sums below this threshold for the purpose of avoiding the requirements of the Act.

The Act does not prohibit the district from erecting a building or making improvements on a force account basis. The term "force account" means the purchase of necessary materials and the use of the district's regularly employed staff to provide necessary labor.

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

Federal Funds

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

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

SUBSTITUTE TEACHERS

The board of education employs substitute teachers to follow the daily lesson plan provided by a regular classroom teacher who is unable to be present in his/her class. Individuals wishing to perform duties as a substitute teacher must be annually approved by the board or be subsequently approved by the board for inclusion on the district's master list of substitute teachers. Only substitute teachers included on the district's approved substitute list will be employed by the district. All substitute teachers will be paid at the annual board approved substitute rate of pay.

Prior to employment with the district, a substitute teacher may be required to undergo a background check pursuant to the board's policy governing criminal records searches. General exceptions to the background check requirement relate to teachers of ten or more years who have retired from the district and individuals who have been full time Oklahoma teachers in the past five years at another district where a background check is already available.

The employment of an individual substitute teacher within the district shall be limited as follows:

- maximum of 135 days per school year if the substitute does not have a current or lapsed/expired teaching certificate or bachelor's degree, with a maximum of 135 days in the same assignment;
- maximum of 145 days if the substitute has a lapsed/expired certificate or possesses a bachelor's degree, with a maximum of 145 days in the same assignment; or
- no limit on the number of days within the district or in the same assignment if the substitute holds a valid certificate.

In the event the district is unable to locate a substitute teacher with a valid certificate to teach special education for students with physical disabilities or students with mental retardation, the limitations outlined above may be waived. Prior to waiving these restrictions, the administration will contact the Oklahoma State Board of Education and other local resources to determine the availability of a certified substitute teacher. Substitute teachers teaching special education for more than fifteen (15) consecutive or thirty (30) total days must receive in-service training prescribed by the Oklahoma State Board of Education.

Reference: 70 OKLA. STAT. §6-105

MUSKOGEE PUBLIC SCHOOLS
BOARD OF EDUCATION POLICY

Business and Auxiliary Services
103170

Adopted: August 20, 2019

DUPLICATE CHECKS

The district may issue a second or duplicate check in lieu of any check issued and subsequently lost or destroyed by the payee. No second or duplicate check will be issued until the district has stopped payment on the check by the payor bank or, in the alternative, until an affidavit explaining the circumstances regarding how the original check was lost or destroyed has been submitted to the district by the payee. The appropriate administrator may use his/her discretion in determining which alternative to use to preclude any district loss taking into account the district's past relationship with the payee, the amount of the original check, and other relevant factors.

Reference: 70 OKLA. STAT. §5-189

POLICY ON ELECTRONIC RECORDS, CONTRACTING AND SIGNATURES

Under certain conditions, electronic records and signatures satisfy the requirements of a written signature when transacting business. The District desires to promote effective and efficient use of electronic records to conduct business. The authenticity and reliability of electronic records and signatures relating to governmental transactions are dependent on the accompanying processes, supplemental records and the overall context in which records are created, transferred, signed and stored. The purpose of this policy is to provide guidelines for the use of electronic records and signatures in connection with the transaction of District business.

This policy does not mandate the use of an electronic signature or otherwise limit the right of a party to conduct a transaction on paper, nor does it apply to any situation where a written signature is required by law.

Definitions

1. Attribution - An electronic record or electronic signature is attributable to a person if it was the act of the person. The act of the person may be shown in any manner, including a showing of the efficacy of any security procedure applied to determine the person to whom the electronic record or electronic signature was attributable.
2. Electronic Signature - An electronic sound, symbol, or process attached to or logically associated with a record and executed or adopted by a person with the intent to sign the record.
3. Electronic Record - Any information created, generated, sent, communicated, received or stored by electronic means.

Guidelines

Electronic Records

Electronic records created or received by the District shall be appropriately attributed to the individual(s) responsible for their creation and/or authorization or approval. The District shall utilize available technology to implement reliable methods for generating and managing electronic records. Any electronic record filed with or issued by the District shall be given the full force and effect of a paper record if the following conditions are satisfied:

1. The record is an electronic filing or recording and the District agrees to accept or send such record electronically; and

2. If a signature is required on the record by any statute, rule or other applicable law or District policy, the electronic signature must conform to the requirements set forth in this policy governing the use of electronic signatures. Signatures cannot be altered by ordinary means.

Electronic Signature

An electronic signature may be used unless there is a specific statute, regulation, rule of law or District policy that requires records to be signed in manual (i.e., non-electronic) form. The issuance and/or acceptance of an electronic signature by the District shall be permitted in accordance with the provisions of this policy and all applicable state and federal laws. Such electronic signature shall have the full force and effect of a manual signature only if the signature satisfies all of the following requirements:

1. The electronic signature identifies the individual signing the document by his/her name and title;
2. The identity of the individual signing with an electronic signature is capable of being validated through the use of an audit trail;
3. The electronic signature and the document to which it is affixed cannot be altered once the electronic signature has been affixed
4. The electronic signature must be electronically encrypted or transmitted by technological means designed to protect and prevent access, alteration, manipulation or use by any unauthorized person; and
5. The electronic signature conforms to all other provisions of this policy.

Authorized District Officers

The following positions are considered Authorized Officers/Employees:

Board of Education President
Board of Education Vice President
Board of Education Clerk
Board of Education Treasurer
Superintendent of Schools
Superintendent's Designee
Chief Financial Officer

Authorized Officers/Employees are the individuals delegated the authority to electronically sign documents on behalf of the District, where signatory authority has been granted for a specific transaction or purpose. **This policy is not intended to grant signatory authority to any person who does not have such authority by virtue of their position.**

Unless prohibited by law, Authorized Officers/Employees may, but are not required, to sign documents through an electronic signature on any record, including without limitation contracts, agreements, correspondence, certificates, reports, minutes or

similar documents in those instances in which the Authorized Officer's/Employee's signature is required or permitted. Use of an electronic signature requires the approval of the Authorized Officer/Employee.

All electronic signatures are subject to the District's authentication procedures and Authorized Officers/Employees are required to comply with all security procedures established by the District and its software vendors.

Prohibited Use – All Employees and Officers

No employee or officer may use an electronic signature on any district document on behalf of any other employee or officer unless that person has been granted specific, written authorization to do so. Any unauthorized employee who uses electronic methods to sign documents, or falsifies electronic records or electronic signatures will be subject to disciplinary action up to and including dismissal. The District may also refer violations of this policy for possible criminal prosecution. All employees are required to immediately report any violations of this policy, suspected fraud, or other security concerns to the Superintendent's Secretary.

Employment Applications, Contracts and related Paperwork

Any person applying for employment with the District or signing an employment contract with the District may be required by the District to electronically sign an employment application, contract of employment, or any other employment related paperwork. All electronic signatures are subject to the District's authentication procedures and applicants and employees are required to comply with all security procedures established by the District and its software vendors.

Reference: OKLA. STAT. tit. 12A, §§ 15-101 to 15-121.

IDENTITY THEFT PREVENTION

This policy is adopted to ensure compliance with the Fair and Accurate Credit Transaction Act, 15 USC. §1601 et seq. and the Federal Trade Commission's rules regarding Identity Theft (the "Red Flag Rules"). The district is subject to the Red Flag rules if it is a "Creditor." The district is a Creditor if it provides any goods or services for a fee *and* as a matter of course extends credit to its customers by offering them the ability to pay for those goods and services *after* they are provided as opposed to requiring prepayment or contemporaneous payment. The district is a creditor with respect to limited areas involving a low risk of identity theft. Areas in which the district allows a debtor to defer payment owed the district include but are not limited to school meal charges, after school care charges, adult education tuition, facility use charges and similar accounts. The district must review all of its "Accounts" to determine whether any of those accounts are "Covered Accounts." As to "Covered Accounts," it must develop an Identity Theft Program (herein referred to as the "Program") designed to detect, prevent, and mitigate identity theft in connection with a Covered Account.

Definitions

For purposes of this policy, the following definitions apply.¹

"Account" means a continuing relationship established by a person with the district to obtain a product or service for personal, family, household, or business purposes. Note that the requirements of the federal rules apply not only to existing accounts but also to new account openings, when a relationship has not yet been established.

"District" means the Muskogee School District.

"Covered Account" pertains to accounts which involve prepayment or contemporaneous payment as well as payment in arrears and means (i) an account that the district offers or maintains, primarily for personal, family or household purposes, that involves or is designed to permit multiple payments or transactions, such as a child care account, cafeteria account, tuition account, or facility rental account and similar accounts; and (ii) any other account that the district offers or maintains for which there is a reasonably foreseeable risk to customers or to the safety and soundness of the district from identity theft, including financial, operational, compliance, reputation, or litigation risks. This category of Accounts includes the district's small business accounts, sole proprietorship accounts, and accounts for which the risk of identity theft is reasonably foreseeable because of how they are opened and accessed (i.e., the accounts can be accessed without face-to-face contact, such as through the Internet or by telephone).

¹ Other than district and "personal identifying information", definitions provided in this section are based upon the definitions provided in 16 C.F.R. § 681.1.

“Credit” means the right granted by the district to a debtor to defer payment of debt or to incur debts and defer its payment or to purchase property or services and defer payment therefore.

“Creditor” means a business or organization that regularly defers payment for goods or services or provides goods or services and bills customers later (as opposed to requiring prepayment or contemporaneous payment).

“Customer” means a person that has a covered account with the district.

“Identity Theft” means fraud committed or attempted using identifying information of another person without authority.

“Person” means a natural person, a corporation, government or governmental subdivision or agency, trust, estate, partnership, cooperative, or association.

“Personal Identifying Information” means a person’s credit card account information, debit card information, bank, bank account information, and driver’s license information and for a natural person includes the individual’s social security number, mother’s birth name, and date of birth.

“Red Flag” means a pattern, practice, or specific activity that indicates the possible existence of identity theft.

“Service Provider” means a person that provides a service directly to the district.

The district shall create an Identity Theft Program to protect Covered Accounts. At a minimum, the district’s Program will:

1. Identify and list the Covered Accounts.
2. Identify and list the red flags indicating that someone might be attempting to obtain services, products or information surreptitiously by claiming to be someone they are not.
3. Explain how the district will detect red flags that have been identified.
4. Explain how the district will respond if a red flag is detected.
5. Designate a senior administrative employee to administer the program.
6. Describe the district staff who need to be trained on how to detect and respond to identity theft and the training they should receive.
7. To ensure the protection of the district’s clients from identity theft via the district’s contracted service providers, identify the categories of service providers that should be required via contract to assist the district in detecting red flags and must therefore either have their own red flags program or ensure compliance with the district’s red flags program.

8. Identify how the district will periodically reassess its operations to ensure that its red flag program reflects the current risks of identity theft to its clients (including, but not limited to, the types of records/accounts that are subject to the Red Flag Rules as Covered Accounts and the activities or occurrences that should be designated as a red flag for identity theft).
9. Be submitted to the district's board for approval.
10. Be annually re-evaluated to determine whether material changes have occurred warranting changes to the district's identity theft policy and program.

Updating the Program

Upon the recommendation of the superintendent the board of education shall annually review and, as deemed necessary by the board, update the district's identity theft prevention program along with any relevant red flags in order to reflect changes in risks to customers or to the safety and soundness of the district and its covered accounts from identity theft. In so doing, the board of education shall consider the following factors and exercise its discretion in amending the program:

1. The district's experiences with identity theft;
2. Updates and methods of identity theft;
3. Updates and customary methods used to detect, prevent, and mitigate identity theft;
4. Updates on the types of accounts that the district offers or maintains; and
5. Updates in service provider arrangements.

Reference: 15 U.S.C. 1601 et seq.

TELEPHONES

The board of education recognizes that telephone communications by staff and students are occasionally necessary. However, classes must not be interrupted for routine telephone calls.

1. Students or staff may be called from the classroom only for urgent or emergency telephone calls.
2. Personal telephone calls are discouraged; however, students may obtain permission from office personnel to use the office telephones for business use only during class breaks.
3. Incoming messages will be accepted and delivered during class breaks, if time permits.
4. Teaching staff may use office telephones, if necessary. Long distance calls will not be made without permission from the principal. When personal long distance calls are made, arrangements must be made to promptly reimburse the district for the cost.

TRANSPORTATION MANAGEMENT

The board of education recognizes that transportation is a necessary element of educational opportunity and, therefore, the board shall grant opportunities for transportation. Transportation is a privilege extended to students in the district only when necessary for the accomplishment of one of the following purposes:

1. To provide transportation for any child who is participating in pre-kindergarten, kindergarten or early childhood program operated by the school district or any Head Start program offered by the school district.
2. To transport children whose homes are more than a reasonable walking distance, as defined by regulations of the State Board of Education, from the school attended by such child. Transportation may be provided to children whose residence is within one and one-half miles of the school attended only within the limits of time, space and funds. Such transportation privileges shall be withdrawn if the board believes it to be in the best interest of the school district.
3. To allow, when practicable, the use of school buses for the transportation of students to school activities and on field trips that have been approved by the superintendent.
4. To provide adequate education facilities and opportunities which otherwise would not be available.
5. To contract for the use of school buses and other school transportation for general public use including religious, political, literary, community, cultural, scientific, mechanical, agricultural or parental involvement purposes, and to make a reasonable charge to cover the cost of the use of school buses and other school transportation.

SCHOOL BUS SAFETY PROGRAM

The safety and welfare of student riders will be the first consideration in matters pertaining to transportation. Children will be instructed as to the proper and safe conduct while aboard transportation vehicles. Emergency evacuation drills will be conducted regularly to acquaint students thoroughly with appropriate procedures for emergency situations.

All vehicles used to transport students will be maintained in a condition that will provide reasonably safe and efficient transportation service with a minimum of delay and disruption due to mechanical or equipment failure. Buses will be replaced as required to provide good equipment at all times.

Complete reports on any school bus accident should be filed in a timely manner. These reports should be brought to the attention of the board as soon as possible.

School bus drivers will always bring the bus to a full stop – with caution lights flashing – before loading or unloading passengers.

When unloading passengers, the driver will stay in place with caution lights on until the exiting passengers are at a safe distance away from the bus and/or clear of the street.

In furtherance of the District's School Bus Safety Program, the District may install and operate a video-monitoring system in or on its school buses or bus stop-arms for the purpose of recording a violation by a driver attempting to overtake a school bus with red loading signals in operation. See District policy "Use of Security Cameras."

Reference: OAC 210:35-13-115; OKLA. STAT. tit. 47 §11-705

STUDENT INTERVIEWS AND INTERROGATIONS

Should it become necessary for a member of a law enforcement agency or a social service agency to talk with a student and/or school personnel during the school day, the following procedures shall be observed to protect the rights of all parties involved.

In the event of an emergency which necessitates that law enforcement be contacted, law enforcement personnel may use whatever legal means are necessary to ensure the safety of all district students, patrons and employees.

In non-emergency situations, such as when law enforcement personnel wish to question a student or employee, law enforcement personnel must coordinate their business through the principal's office. The principal or designee is authorized to summon the student or employee to a private area so that law enforcement personnel may conduct a private interview. If the interview involves a minor student, district employees will attempt to contact the student's parent or guardian prior to the interview. However, the inability to reach the student's parent or guardian will not prevent the interview from being conducted. A school employee may remain present during the interview of a minor student to ensure compliance with the child's rights but may not participate in the interview. Students will not be removed from campus unless the student is being arrested or being placed in protective custody.

Child welfare workers wishing to interview minor students about suspected abuse or neglect must also coordinate their business through the principal's office. The principal or designee is authorized to summon the student to a private area so that the child welfare personnel may conduct a private interview. The principal or designee will ask the child welfare worker whether a parent/guardian may be contacted and/or whether a school official may be present for the interview, and school officials must comply with those instructions. Child welfare workers wishing to remove any student from school property must have a properly signed court order or be accompanied by local law enforcement for the removal of the child.

Reference: 10A OKLA. STAT. §1-2-105

PROCUREMENT PLAN FOR FOOD SERVICES

Muskogee Public Schools, in order to comply with applicable provisions of United States Department of Agriculture Procurement Standards has established a Procurement Plan for the purchase of goods/services for Child Nutrition Services. The purpose of this plan is to ensure that all procurement transactions will be conducted in a manner that provides maximum open and free competition.

1. General Provisions:

All awards will be made to responsive vendors on a competitive basis considering price, service, compliance with specifications, acceptability of product and previous vendor performance. Substitutions/equal alternatives may be considered. Awards may be made by item, by class, or by groups of items. Supplier may request bid preference for product grown, produced or manufactured in Oklahoma. State Bid Contract pricing may be considered. The right is reserved to consider the purchase of products offered at food show discount prices.

2. Chart of Procedures:

<u>Item</u>	<u>Purchase Period</u>	<u>Procurement Method</u>
Dairy, Juice & related products	Annually	Competitive sealed bids
Bread & related products	Annually	Small purchase procedure
Produce	Annually	Competitive sealed bids
Food - Prime Vendor	Annually (with renewal options)	Competitive sealed bids
Utensils & Small Equipment	As needed	Small purchase procedure
Disposables	Annually	Small purchase procedure
Laundry service	Annually (with renewal options)	Small purchase procedure
Pest Control	Annually (with renewal options)	Competitive sealed bids
Uniforms	Annually	Small purchase procedure
Large equipment	As needed	Competitive sealed bids
Chemicals/Dishroom	Annually (with renewal option)	Small purchase procedure

3. Procurement Methods:

The procurement methods that will be used by the School Food Authority and the categories of goods and service that will be purchased by each method are as

follows: NOTE: The \$250,000 threshold may apply to individual item or multiple item purchases on an aggregate basis. Aggregate is defined as any purchase or group of purchases estimated at \$250,000 or more and capable of being secured from a single source on a given date or purchase period. Breaking up purchases with the intent of circumventing formal advertising procedures is contrary to federal procurement regulations. Any change in the district's normal purchasing practices which results in the aggregate amount purchased becoming less than \$250,000 must be documented for review and audit purposes.

- A. Small Purchase Procedures will be used to purchase goods, equipment, and services where the aggregate cost is less than \$250,000.

When small purchase procedures are used, the following conditions, stipulations, and terms will be met:

1. The goods, equipment, or services to be purchased will be adequately and consistently described for each prospective supplier so that each one can provide price quotes on the same merchandise or service.
2. An adequate number of qualified sources will be contacted to provide such quotes. NOTE: The term "adequate number" as defined by USDA is three qualified sources.
3. Specifications may be sent by fax, e-mail, telephone or deliver in person to three adequate vendors.
4. Responses from vendors can be either in written or verbal form. Verbal quotes must be documented.
5. Price quotation responses will be retained with other program documentation and records for a period of three (3) years after the end of the fiscal year to which they pertain.

- B. Sealed Bids will be used to purchase goods, equipment and services where the aggregate is \$250,000 or more.

When the sealed bids are used, the following conditions, stipulations, and terms will be included:

1. The invitation to bid will be publicly advertised.
2. Bids will be solicited from an adequate number of known suppliers in sufficient time prior to the date set for the opening of the bids. The term "adequate number" is determined to be at least three.
3. The invitations for bid will clearly define the items or services needed in order for the bidders to be able to properly respond. This includes product specifications and general purchasing conditions.
4. All bids will be opened publicly at the time and place stated in the invitations for bid.

5. A firm, fixed-price contract award will be made by written notice to the responsible bidder whose bid is lowest, assuming the bid conforms to the requirements in the invitation for bid, except that preference may be given to products produced, manufactured, or grown in Oklahoma.
6. Where specified in the bidding documents, factors such as discounts, transportation costs, and life cycle costs (for equipment), if applicable, will be considered in determining which bid is lowest and best.
7. Payment discounts will only be used to determine the low bid when prior experience of the School Food Authority indicates that such discounts are generally taken.
8. Any and all bids may be rejected when there are sound documented reasons in the best interest of the program.
9. Cost plus a percentage of cost method of contracting is prohibited.
10. All bids received will be documented and such documentation shall be maintained by the school district with other program records for three (3) years after the end of the fiscal year to which they pertain.
11. When the SFA chooses, purchases may be made through a cooperative agreement with other school districts. Sealed bid (formal advertising) procedures will be followed as required.
12. The procurement lends itself to a firm fixed price contract and bidder is selected primarily on price **(NO NEGOTIATING)**.

C. Competitive Negotiation Proposals will be used whenever competitive sealed bids are determined to be inappropriate, unfeasible, or impossible, and will adhere to the following conditions, stipulations, and terms:

1. Proposals will be solicited from an adequate number (at a minimum, three) of qualified sources to permit reasonable competition.
2. The request for proposals will be publicized and any reasonable request by other sources to compete must be honored to the maximum extent possible.
3. The request for proposal will identify all significant evaluation factors including, but not limited to, price or cost where required and their relative importance.
4. The School Food Authority will provide a mechanism for technical evaluation of the proposals received and for selection of contract award.
5. The contract will be awarded to the responsible bidder whose proposal is most advantageous to the School Food Authority when price and other factors are considered.

6. Cost plus a percentage of cost method contracting is prohibited.
7. All requests for proposals received will be documented and such documentation shall be retained by the school district with other program records for three (3) years after the end of the fiscal year to which they pertain

D. Non-competitive Proposals is procurement through solicitation of a proposal from only one source; or after a solicitation of a number of sources, competition is determined inadequate.

Circumstances under which procurement may be made by noncompetitive proposals are limited to the following:

1. The merchandise or service is available only from a single source.
2. A public emergency exists and the urgency for the requirement will not permit the delay involved with competitive sealed bids (formal advertising) or competitive negotiation.
3. After solicitation from a number of sources, competition is found to be lacking.

E. Micropurchasing is procurement of products and services whose aggregate costs do not exceed \$10,000.

1. Price comparisons are not required for micropurchases as long as the School Food Authority considers the price to be reasonable.
2. Program operators may not always purchase from only one source, rather, purchases must regularly be made using available qualified sources to the extent practicable.

F. Prime Vendor:

When a school food authority chooses to purchase by a prime vendor agreement. Whereby Muskogee Schools, Child Nutrition Department would agree to purchase a minimum of 80% of food and paper items (excluding milk and dairy, bread, produce and special order items) from one primary broad line vendor/distributor.

G. Oklahoma Farm to School Program:

If Muskogee Schools chooses to participate in the Farm to School programs being promoted by the USDA and the state of Oklahoma, the farmers we wish to work with must be contacted about the availability of specific product(s) they offer. Upon reviewing the lists of available produce, estimate the approximate volumes used weekly for each item in which you are interested. Farmers are encouraged to submit price quotes and packing sizes. The micropurchasing threshold will be used for Farm to School purchases. The micropurchasing threshold is set at \$10,000. Purchase of produce from local farmers should be distributed evenly.

4. Buy American Provision:

Section 104(d) amended Section 12(n) of the National School Lunch Act (NSLA) (42 U.S.C. 1760) to require SFAs participating in the National School Lunch Program (NSLP) and School Breakfast Program (SBP) in the contiguous United States to purchase for those programs, to the maximum extent practicable, domestic USDA Foods or products. For purposes of the provision, the term domestic food commodity or product means agricultural USDA Foods produced in the United States and food products processed in the United States SUBSTANTIALLY using agricultural USDA Foods that are produced in the United States. The Conference Report accompanying Public Law 105-336 makes it clear that the term SUBSTANTIALLY means that over 51 percent of the processed food comes from American-produced products.

5. Code of Conduct:

Muskogee Public Schools maintains the following code of conduct in regard to its officers, employees or agents who are engaged in the award and/or administration of contracts supported by CNS program funds.

1. No employee, officer, or agent of the school district shall participate in selection of or in the award of administration of a contract supported by program funds if a conflict of interest, real or apparent, would be involved.
2. Conflict of interest arises when any of the following has a financial or other interest in the firm selected for the award:
 - a. The employee, officer, or agent;
 - b. Any member of his/her immediate family;
 - c. His or her partners;
 - d. An organization that employs, or is about to employ, any of the above.
3. The school districts officers, employees, or agents shall neither solicit nor accept gratuities, favors, or anything of monetary value from contractors, potential contractors, or parties to sub-agreements.
4. The purchase, during the school day, of any food or service from a contractor for individual use is prohibited.
5. The removal of any food, supplies, equipment, or school property, such as official records or recipe books, is prohibited.
6. The outside sale of such items as used oil, empty cans, and the like will be sold by contract between the Muskogee Public Schools and the outside agency. Individual sales by any school person to an outside agency or other school person is prohibited.
7. Failure of any employee to abide by the above-stated code could result in disciplinary action including reprimand by Board of Education and/or dismissal by Board of Education. Interpretation of the code will be given at any time by contacting the Chief Financial Officer at (918) 684-3700, ext. 1623. The Muskogee

Public Schools will not be responsible for any other explanation or interpretation that anyone presumes to make on behalf of the Board of Education.

6. Emergency Purchasing

1. If it is necessary to make a one-time emergency procurement to continue service or obtain goods, the purchase shall be made, and a log of all such purchases shall be maintained by the district. The following emergency procedures shall be followed. All emergency procurements shall be approved by the Food Service Director, the Chief Financial Officer and/or the Board of Education. At a minimum, the following emergency procurement procedures shall be documented:
 - Item name
 - Dollar amount
 - Vendor
 - Reason for emergency
2. If the emergency purchasing need requires a contract, all books, records and other documents relative to the award of the contract must be retained for three (3) years after final payment. Specifically the SFA/Sponsor shall maintain, at a minimum, the following documents:
 - Written rationale for award cost or price;
 - A copy of the original solicitation;
 - The bidding and negotiation history and working papers;
 - The basis for contractor selection;
 - Approval from the State Agency to support a lack of competition when competitive bids or offers are obtained;
 - The terms of the contract;
 - Any changes to the contract and negotiation history;
 - Billing and payment records;
 - A history of any contractor claims *OR* contract breaches

7. Geographic Preference:

The use of statutorily or administratively imposed in-state or local geographic preferences for procurements under USDA entitlement programs is prohibited, except for unprocessed locally grown or locally raised agricultural products. The Food, Conservation, and Energy Act of 2008 (Public Law 110-246, Section 4302), amended Section 9(j) of the NSLA to allow institutions receiving funds through CNP to apply a geographic preference when procuring unprocessed locally grown or locally raised agricultural products.

When geographic preference is used, an SFA must still get quotes from several farmers when procuring unprocessed locally grown or locally raised agricultural products so that competitors have an opportunity to compete for the bid.

8. Protest Procedure:

A supplier who wishes to file a protest pertaining to a bid, quote, or competitive proposal must file as follows.

- A protest shall be in writing and shall include the company name, address and other contact information of the supplier, the name of the bid, quote, or competitive proposal under dispute, a detailed description of the specific reason(s) for the protest, copies of any supporting documentation, and the specific ruling or relief requested.
- Written protests shall be addressed and delivered to: The Superintendent of Schools, Muskogee Public Schools, 202 West Broadway, Muskogee, OK 74401.
- Protests based on the terms of a bid, quote, or competitive proposal must be received at least seven (7) working days prior to the submittal deadline for the bid, quote, or competitive proposal.
- Protests based on the award of the bid, quote, or competitive proposal must be received no more than three (3) working days after the award is made.
- Upon receipt of a timely written protest, the Superintendent or designee shall promptly consider the protest. If the protest is not resolved by mutual agreement of the aggrieved person and the District, the Superintendent or designee will promptly issue a decision in writing, stating the reason(s) for the action taken. The Superintendent or designee will provide a copy of the decision to the protesting supplier.
- The Superintendent's decision or designee may be appealed by a written request for review received no more than two (2) working days after the protesting supplier's receipt of the decision. The request for review shall be addressed and delivered to: The Clerk of the Board of Education, Muskogee Public Schools, 202 West Broadway, Muskogee, OK 74401. The request for review must be in writing and shall include a detailed description of the specific reason(s) the supplier disagrees with the decision of the Superintendent or designee and a copy of any supporting documentation. The decision of the school board will be final.
- The Superintendent/designee and the board will consider only timely protests and requests for review.

9. Nonkickback Affidavit:

Please note that Oklahoma statute 62 O.S. §310.9 requires a signed and notarized nonkickback affidavit on every purchase order of \$25,000 or more. The affidavit is to be signed by the person or persons authorized to accept payment on behalf of the architect, contractor, engineer, or supplier.

10. Lobbying Certification:

- a. Lobbying certification must be obtained for procurement contracts of more than \$100,000. Any vendor whose contract award is for more than \$100,000 must complete a Certification Regarding Lobbying form. The SFA must keep this signed certification statement on file with a copy of the vendor's contract.
- b. Any SFA or its vendors who participate in lobbying activities must complete a

Disclosure of Lobbying Activities form. SFAs must submit this completed form to the State Agency. A vendor would submit its completed form to the SFA.

11. Debarment or Suspension:

An SFA is prohibited from contracting with an individual or company that has been debarred or suspended in accordance with 2 CFR §180, as adopted and modified by USDA regulations at 2 CFR §417. This prohibition does not extend to contracts in existence at the time of the debarment or suspension or to most contracts under \$25,000. Rather, it applies to new contracts and extensions or renewals of existing contracts of \$25,000 or more and to contracts for audit services, regardless of amount.

12. Beverage and Snack Agreements:

In some cases, the exclusive contracts do not involve nonprofit school food service account (SFSA) funds, in which case there are no federal FNS procurement issues involved. However, if any nonprofit school food service products are purchased via the exclusive contract, then all federal procurement requirements must be met. If small purchase procedures are used for a procurement of \$250,000 or less, price or rate quotations must be obtained from an adequate number of qualified sources. Additionally, if nonprofit school food service products are included in the contract, any rebates, commissions, scholarship fund contributions, or any other payments back to the SFA or SFA-related organizations must be reimbursed to the nonprofit SFSA on a prorated basis.

- a. No federal prohibition on multiyear contracts other than for FSMCs. It is suggested, however, that school procurement officials consider the impact of multiyear contracts, as opposed to one-year contracts, on beverages and snacks. Long-term contracts would appear to be more appropriate for nonperishable products and services such as warehousing and equipment rental. As noted above, however, there is no federal prohibition on these longer-term contracts.
- b. Public Law 108-265, Section 102, requires a school participating in the NSLP shall not directly or indirectly restrict the sale or marketing of fluid milk products by the school (or by a person approved by the school) at any time or any place on the school premises or at any school-sponsored event.
- c. Schools participating in the NSLP must check all beverage contracts for language that may limit the sale of milk on school grounds. The sale of milk cannot be limited at any time during the school day or at any place on the school premises. Contracts may have language that is hard to understand. Look for the term ***Exclusive Pouring Rights***. Every school district must have amended their beverage contracts that limit the sale of milk should such language exist. The primary effect of this provision is to prevent contract limitations on the sale of fluid milk in competition with other beverages.

13. Contract Work Hours and Safety Standards
Equal Opportunity and Discrimination:

(40 U.S.C. 3701-3708). Where applicable, ***all contracts*** awarded by the nonfederal entity in excess of \$2,500 that involve the employment of mechanics or laborers must include a provision for compliance with 70 U.S.C. 3702 and 3704, as supplemented by Department of Labor regulations (29 CFR Part 5). Under 40 U.S.C. 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous, or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market or contracts for transportation or transmission of intelligence.

Equal Opportunity and Discrimination

The vendor certifies it is an Equal Opportunity Employer, a provider of services and/or assistance, and is in compliance with the 1964 Civil Rights Act, Title IX of the Education Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, as amended, and Executive Orders 11246 and 11375. The vendor assures compliance with the Americans With Disabilities Act of 1990 (Public Law 101-336), all amendments to, and all requirements imposed by the regulations issued pursuant. **(FORMAL CONTRACTS OF \$10,000 OR MORE)**

Contracts in excess of \$250,000 shall contain provision that require compliance with all applicable standards, orders, or requirements issued under Section 306 of the **Clean Air Act** (42 U.S.C. 1857[h]), Section 508 of the **Clean Water Act** (33 U.S. C. 1368), Executive Order 11738, and **Environmental Protection Agency (EPA) Regulation** (40 CFR §15), which prohibit the use of nonexempt federal contracts, grants, or loans of facilities included on the EPA list of violating facilities. The provision shall require reporting of violations to the grantor agency and to the EPA Assistant Administrator for Enforcement (EN-329). The contract must recognize mandatory standards and policies relating to energy efficiency that are contained in the State Agency conservation plan issued in compliance with the Energy Policy and Conservation Act (Public Law 94-163).

14. Termination for Cause:

Contracts Exceeding \$10,000

Contracts must include provisions that address termination for cause and convenience by the vendor. Furthermore, Muskogee Public Schools reserves the right to terminate for cause due to breach or failure of a set precedent or condition, mutual consent, bankruptcy or a legal order that prohibits the agreement.

15. The SFA will take all necessary affirmative steps to assure that **minority firms**, **women's business enterprises**, and **labor surplus area firms** are used when possible. Affirmative steps shall include:
- a. Placing qualified small and minority businesses and women's business enterprises on solicitation lists.
 - b. Assuring that small and minority businesses and women's business enterprises are solicited whenever they are potential sources.
 - c. Dividing total requirements, when economically feasible, into smaller tasks or quantities to permit maximum participation by small and minority businesses and women's business enterprises.
 - d. Establishing delivery schedules, where the requirement permits, which encourage participation by small and minority businesses and women's business enterprises.
 - e. Using the services and assistance of the Small Business Administration (SBA) and the Minority Business Development Agency of the Department of Commerce.
 - f. Requiring the prime contractor, if subcontracts are to be let, to take the affirmative steps listed above.

This plan adopted by the Board of Education of the Muskogee School District at the regularly scheduled meeting on this, the 8th day of June, in the year 2004. Revised copy approved by the Board of Education on this, the 18th day of December, in the year 2018. Revised copy approved by the Board of Education on this, the 10th day of November, in the year 2020.

CHILD NUTRITION INFORMATION FOR EMPLOYEES

The district participates in the USDA's child nutrition program, and all employees, even those not specifically connected with child nutrition services, are required to adhere to applicable standards and guidelines.

Staff Training and Employee Meals

The Food Service Director is responsible for ensuring that all child nutrition workers have appropriate professional development and training opportunities to comply with USDA, health, safety, and sanitation requirements. The Food Service Director will also provide a copy of this policy to all employees who are responsible for complying with this policy. Although they are not specifically responsible for enforcing the policy, school social workers, counselors, nurses, homeless liaison, etc. will also receive a copy of this policy.

The district operates on a commodity program and is prohibited from providing any unpaid meals to employees. Meals furnished to employees of the district's food service department are excluded from this regulation.

Charging Meals

School employees may charge meals if the principal allows it.

Policy Distribution

This policy will be widely circulated in the community prior to the start of each school year and will promptly be provided to families who join the district after the start of the school year. The superintendent has discretion in determining appropriate distribution methods, but the board expects the distribution to occur through as many of the following methods as deemed practical:

- District's website
- Emails/newsletters

Collections

Only employees authorized by the Food Service Director are permitted to have contact with parents regarding delinquent accounts.

Recordkeeping

The superintendent and the Food Service Director will maintain records of distribution of this policy.

The Food Service Director will retain evidence of the efforts made to collect unpaid meal charges, including evidence that the collection efforts were timely and in accordance with the district's family policy.

The Food Service Director will maintain the financial documentation showing when the delinquent charges were reclassified as bad debt (operating loss) and how the funds were restored using non-federal sources.

CHILD NUTRITION INFORMATION FOR FAMILIES

All district students may, but are not required to, participate in any or all of the district's child nutrition program services. The district participates in the following USDA child nutrition programs:

- National School Lunch Program (NSLP)
- School Breakfast Program (SBP)
- Fresh Fruit & Vegetable Program (FFVP)
- Summer Food Service Program (SFSP)
- Farm to School

Although the district complies with all USDA child nutrition program requirements, this policy is designed to provide families with pertinent information regarding meals at schools. Any individual who wishes to obtain more detailed information about the district's programs may contact the Food Service Director.

Cafeteria Use

Except under special circumstances² all students will eat in the cafeteria or other designated location.

Guests must be cleared by the building principal prior to joining a student in the cafeteria. Non-district individuals or groups who wish to use the cafeteria must also be cleared by the Food Service Director.

Meal Costs

The superintendent will establish the cost for ala carte items available for purchase by students prior to the beginning of each school year. Ala carte items costs will be publicized and posted in the cafeteria.

The district provides several options to keep parents informed of the account balance of ala carte items purchased by a student. The district will send notice to parents when a student's account balance is \$5.00.

Parents may also check a student's account balance online through the parent information system.

² Special circumstances include, but are not limited to, lunch detention, severe food allergies, and IEP requirements. The district will not separate students during meals based on a student's ability to pay.

Collecting Debt

The district must work to ensure that its child nutrition services are run in a fiscally responsible manner. Families will be notified when their student's account balance for ala carte items purchased is low so that the account can be replenished.

FOOD ALLERGIES

The district is committed to ensuring equal access to its programs for all students, including students with food allergies. Reasonable accommodations will be made to allow students with food allergies to participate in all its programs. The district will not tolerate any retaliatory or bullying conduct toward a student due to a food allergy.

Food Allergy and Anaphylaxis Action Plan

A Food Allergy and Anaphylaxis Action Plan (“Plan”) will be developed for each student who has a food allergy. The Plan will be based on an interactive meeting between the parent/guardian and Nutrition Education Coordinator, and will be supported by medical documentation provided by the student’s healthcare provider. The Plan will include, at a minimum, the following information:

- specific allergens / ingredients to be avoided
- preventative measures
- method by which employees can easily identify the student
- type of reaction to the allergen
- actions to be taken in case of suspected exposure when no reaction is observed
- actions to be taken when symptoms are present
- reasonable accommodations which will be provided for the student

Reasonable accommodations may include actions such as an alternative meal which is as nutritionally comparable as reasonably possible, a meal prepared in a separate area of the kitchen, a meal served at a separate table in the cafeteria, etc. The reasonable accommodations identified during the interactive development of the student’s Plan are subject to final approval by school officials. In the event the parent/guardian is not satisfied with the results of the interactive meeting or the established Plan, the parent/guardian may request a review of the accommodations and/or the Plan by contacting the superintendent in writing within five (5) school days of the development of the Plan.

The Plan will be reviewed/updated through the interactive process at least once per school year.

Cafeteria Employees

The district provides training regarding food allergies to all individuals who work in the cafeteria. Although the district will attempt to protect student confidentiality to the extent safely possible, cafeteria workers are considered individuals who have a need to know

information regarding student food allergies. Accordingly, relevant cafeteria staff will have access to all Plans.

The district will clean all cafeteria surfaces in accordance with accepted standards. Tables and work areas which are specifically designated as allergen free, if applicable, will be cleaned with designated cloths/sponges to avoid cross contact.

Food Consumption Outside of Cafeterias

Except under limited circumstances such as banquets or similar events involving approved food service, the district does not permit food to be consumed outside the cafeteria. Teachers planning on permitting food consumption for a special occasion or activity must take reasonable precautions to ensure that a student with a food allergy is not inadvertently exposed to an allergen, and that the student may participate in the activity in a meaningful way with other students.

IMMUNIZATIONS

The board of education shall provide an environment for students to study, interact, and learn. Such an environment shall be reasonably free of known hazards that may threaten or endanger the health of our children or educators.

The board of education shall require that no child be admitted to this school district unless and until certification from a licensed physician or authorized representative of the State Department of Health is presented to the school administrators that such child has received or is in the process of receiving the immunizations currently required by Oklahoma State Department of Health regulations, unless an exemption has been granted from the immunizations on medical, religious, or personal grounds or as otherwise required by law.

If a parent or guardian is unable to pay for the required immunizations, the school will refer the student to the State Department of Health for assistance.

Reference: 70 OKLA. STAT. §1210.191, 70 OKLA. STAT. §1210.192

COMMUNICABLE DISEASES

Many communicable diseases, including Human Immunodeficiency Virus (HIV) and/or Acquired Immune Deficiency Syndrome (AIDS), require special consideration in the school environment. The board of education seeks to provide an environment which is safe for all students and employees, while maintaining the dignity and privacy of individuals infected with communicable diseases.

Current research indicates that the risk of transmitting HIV/AIDS and other communicable diseases is low in the school setting when appropriate procedures are followed. All school employees are required to follow the district's Bloodborne Pathogen Exposure Control Plan at all times when there is a potential for exposure to any bodily fluid. Parents/guardians will be notified in the event a minor student has been exposed to a potentially infectious agent.

Information regarding an individual's communicable disease status will be maintained in a separate confidential file and will only be disclosed:

- in compliance with Oklahoma law; or
- with the express approval of the superintendent.

Information about an individual's communicable disease status will not be included in the individual's regular school or health records. Any individual who discloses another person's communicable disease status without the superintendent's express authorization will face disciplinary action.

Communicable Diseases for Which Isolation or Quarantine is Required

No student having a communicable disease, requiring a period of isolation or quarantine, shall enter or remain at a district school site. This shall be in effect until the order for quarantine or isolation has expired or permission for entry and return to the school site and activities has been given by the local county health department or State Department of Health. It shall be the responsibility of the student's parent(s) or legal guardians and District administration—not the student's teacher—to exclude the student. In the event a student known to be infected arrives at a school site or, after their arrival, is discovered to be infected—a school site administrator shall discretely remove the student from the class or activity, place the student in a monitored room where the student will not come into close contact with non-infected persons, and contact the student's parent or legal guardian to make arrangements to send the student home.

Student Admission

No student will be denied an education or participation in the activities of the district based solely on his/her status as a student infected with a communicable disease. In the event the

school administration learns that a student may have a communicable disease, the superintendent or designee will consult with the Oklahoma State Department of Health regarding an appropriate educational environment for the student. All decisions regarding an appropriate educational setting for the student will be made on a case-by-case basis following established policies and procedures for students with chronic health problems or other disabilities. The placement decision will be periodically reviewed, and will also be reviewed at any time a staff member observes behavior which might pose a reasonable risk of transmitting the communicable disease.

Employment

No individual will be denied employment or have his/her contract nonrenewed based solely on his/her status as an individual infected with a communicable disease.

Reference: OKLA. STAT. tit. 63, § 1-507 (2021)

CONTAGIOUS HEALTH CONDITIONS

The district is committed to providing a safe and healthy environment for all students and employees. School administrators will enforce this policy for the benefit of all members of the school community but will attempt to avoid embarrassment to an affected individual as practical given the totality of the circumstances. Students and employees with unique health circumstances may request an exception to this policy by providing a statement from a physician certifying that there is no danger of the condition spreading to others in the school environment. The district will comply with physician instructions when implementing the requirements of this policy.

Any student or employee who is determined to be afflicted with a contagious health condition such as head lice or bed bugs—in all stages/forms of life—shall be prohibited from attending school until a health officer (licensed physician, licensed physician’s assistant, health department official, school nurse, etc.) has determined that the individual is free of the condition or that there is no danger of the condition spreading to others in the school environment.

Students and employees who have had a fever, diarrhea or vomiting must be symptom free for 24 hours, without the use of symptom reducing medication, prior to returning to school.

Students and employees who have pink eye or another eye infection must be symptom free or consult with the school nurse or provide a physician’s statement prior to returning to school.

BED BUG PROTOCOL

The District is committed to providing a safe and healthy environment for all students and employees. School administrators will enforce this policy for the benefit of school community but will attempt to avoid embarrassment to an affected individual as practical given the totality of the circumstances.

It is important to remember that bed bugs can resemble other insects and that many bed bugs submitted for identification are not, in fact, bed bugs. If a suspected bed bug is found on a student or the student's clothing, backpack, lunchbox or other belongings, or in a school, a discrete effort should be made to collect a specimen. The specimen should be collected by a staff member wearing rubber gloves and placing the specimen in a plastic bag sealed with tape. The specimen should be collected intact and not crushed by using a piece of tape, gauze or tissue. To kill the specimen, place the sealed bag in a freezer for 30 minutes. Any employee who suspects a bed bug infestation should immediately notify the site administrator. The site administrator will notify:

Director of Maintenance & Facilities
Muskogee Public Schools
202 W. Broadway
Muskogee, Oklahoma 74401
(918) 684-3700

The Director of Maintenance & Facilities will arrange for the specimen to be analyzed to confirm whether the specimen collected is in fact a bed bug. If it is confirmed that a bed bug has been found on a student and/or his or her belongings, the Director of Maintenance & Facilities should:

1. Notify the student's parent/guardian *by phone* if possible. If the parent/guardian cannot be reached by phone, a letter in the form attached to this policy should be prepared and sent home with the student;
2. **Discretely** remove the student from the classroom so that either the school nurse or a qualified individual can perform an inspection of the student's clothing and/or belongings;
3. If it is confirmed that a bed bug exists either on the student's clothing or belongings, then the student should be provided a temporary change of clothing. The clothing (including hats, jackets, shoes, etc.) should be placed in a dryer set on "High" for 30 minutes. The same process should then be followed with the student's belongings. If a dryer is not available, the clothes and/or belongings should be placed in a plastic bag or plastic container;

4. After treatment, the student should change back into their clothing and returned to class; and
5. Remaining belongings should be placed in a large plastic bag or plastic container; and
6. The student should **not** be excluded from the classroom due to bed bugs.

School Actions Prior to Treatment

If it is confirmed that a bed bug has been found and determined that a site needs professional extermination inspection/services, do not remove anything from the affected area until directed to do so by the pest control company or the Director of Maintenance & Facilities. Care should be taken to limit the possible spread of the insects by transporting them to other areas of the site. If no other insects are found on inspection of the affected area, it is not necessary to vacate the area prior to pest control inspection.

Care of Students With a Known Infestation at Home

The Director of Maintenance & Facilities should meet with the student's family to address resources and methods to reduce the spread of bed bugs into the school environment. The student's family should be notified that an individual plan of care will be developed for the student, and that this plan will be followed until the District receives documentation from a pest control service that the home infestation has been eradicated.

An individual plan of care will be developed for the student which includes:

1. Discreetly removing the student to a private area upon arrival at school;
2. Providing bed bug-free clothing and shoes for the student to change into upon arrival;
3. After removing the items needed for the school day, the student's clothes and belongings from home should be placed in a dryer set on "High" for 30 minutes. If a dryer is not available, the clothes and belongings should be placed in a plastic bag or container and the student allowed to attend class in the school-provided clothing;
4. Spare textbooks may be provided for the student to use at school and **left in the classroom**;
5. At the end of the school day, the student will be allowed to take their clothing and/or belongings home.

The individual plan of care developed for a student will remain in place until there is cause to believe the bed bug issue has been cleared from the home and the student has arrived to

school with no signs of bed bugs for ten (10) school days.

CLASSROOM OR SITE FORM LETTER TO ALL PARENTS

[SCHOOL LETTERHEAD]

[Date]

Dear Parent or Guardian:

We have recently found a bed bug specimen in your child's classroom. Bed bugs may "hitch-hike" on a student's clothing, shoes, books or backpack. While bed bugs are a nuisance, they are not known to spread disease. A bed bug bite is painless and may or may not become swollen and itch, much like a mosquito bite. It is advisable to watch for clusters of bites, usually in a line, on exposed areas of the body. If you have medical concerns for you or your child, please contact your family physician.

Bed bugs are not a factor of the cleanliness of the environment, they affect everyone equally, and the source of the bed bugs often cannot be determined as they may be found in many places. Even though it is unlikely for bed bugs to infest a school, Muskogee Public Schools will conduct an inspection and, if necessary, the area where the bed bug is found will be treated.

If you have any questions regarding bed bugs within our schools, please contact the Director of Maintenance & Facilities. More information regarding bed bugs found in the home environment, can be obtained from your pest control service or via the following web resources of the Oklahoma State Department of Health, Oklahoma State University and the Environmental Protection Agency:

[https://www.ok.gov/health/Protective Health/Consumer Health Service/Bedding Industry/Bed Bugs.html](https://www.ok.gov/health/Protective_Health/Consumer_Health_Service/Bedding_Industry/Bed_Bugs.html)

<http://pested.okstate.edu/bed-bug-resources/html/bedbug.html>

<https://www.epa.gov/bedbugs>

Sincerely,

Muskogee Public Schools

INDIVIDUAL STUDENT FORM LETTER

[SCHOOL LETTERHEAD]

[Date]

Dear Parent or Guardian:

Today, a bed bug was found on your child or in your child’s clothing or belongings. While this finding does not necessarily mean that the bed bug was brought to school by your child, it is important to your child’s health and to other students and staff that you inspect your home for signs of bed bugs.

Enclosed you will find information about bed bugs and an identification guide to help you with your inspection. Once you have inspected your home, please fill out the form below and return it to your child’s school office by _____ [INSERT DATE & PROVIDE HANDOUTS].

Sincerely,

Muskogee Public Schools

PARENT/GUARDIAN MUST COMPLETE THE FOLLOWING

Muskogee Public Schools:

I have been informed that a bed bug was found on my child or in my child’s clothing or belongings at school. I understand that bed bugs post a threat to my child’s well-being and to the greater school community. I have read and understood the educational materials provided to me regarding bed bugs, and I have:

- Carefully checked my family and home for signs of bed bug infestation.
- Hired a pest control service to check my family and home for signs of bed bug infestation.

Name of parent/guardian: _____
Name of pest control service: _____

After completing a careful inspection, I certify that to the best of my knowledge:

- I or a pest control service found signs of bed bugs in my home, and I will ask that the following actions be taken to eliminate the infestation:

- I or a pest control service did **not** find signs of bed bugs in my home. If I find evidence of bed bugs in the future, I will notify the District immediately and take action to address the infestation.

I understand that bed bugs can be spread to other homes if they are brought to school in clothing, backpacks and other belongings. I understand that if bed bugs are repeatedly found on my child or his/her belongings, that the District may take additional actions to protect the school community from bed bugs.

Signature

Date

Pest Control Service Representative: **[Please attach inspection/treatment document]**

Signature

Date

BED BUG IDENTIFICATION SUBMISSION FORM
(For staff use)

On _____, 2019, an insect presumed to be a bed bug was found (choose one):

- _____ On a person
- _____ On a person's clothing or belongings
- _____ On a piece of furniture or wall

Site: _____
Room number or name: _____
Staff member: _____

Please complete this form and submit it with a specimen, if collected, to:

Director of Maintenance & Facilities
Muskogee Public Schools
202 W. Broadway
Muskogee, Oklahoma 74401
(918) 684-3700

Specimen collection:

- Collect the suspected bed bug intact, do not crush or smash it
- Wear rubber gloves
- Pick up the specimen using a piece of tape, gauze or tissue
- Place the specimen in a plastic bag sealed with tape
- Deliver the specimen to the District employee noted above

MEASLES

Due to an increasing number of measles cases being reported to the Centers for Disease Control, the District has enacted this policy as a part of its effort to prevent and control the spread of communicable diseases in the school environment, and to maintain a safe and healthy environment for all students and employees.

The Oklahoma State Department of Health has identified measles as a highly infectious disease for which an employee or student should be excluded from work or school until free of the disease, and which may require a written statement from the health department or a healthcare provider before the employee or student is permitted to return to work or school.

Symptoms:

Absent a diagnosis of a contagious disease from the health department or a healthcare provider, a school administrator may exclude from a worksite or school an employee or student suffering from or exhibiting the following symptoms:

- Fever alone, 100 degrees Fahrenheit
- Sore throat or tonsillitis;
- Any eruption of the skin or rash;
- Any nasal discharge accompanied by fever;
- Severe cough, producing phlegm; or
- Any inflammation of the eyes or eyelids.

Symptoms of measles include high fever and red blotchy rash starting on the face then spreading to the rest of the body. Symptoms begin to appear about 7 to 14 days after a person is infected, but can be as long as 21 days. Most cases start with a mild to moderate fever, cough, runny nose, red eyes, and sore throat. About three to five days later, a red rash appears. The rash begins at the hairline, then spreads down the rest of the body.

When the rash appears, the fever may be as high as 103°F to 105°F. Other symptoms may include Koplik's spots (tiny white spot with bluish-white centers in the mouth), and feeling run down or achy. Symptoms may last for one to two weeks.

Measles is passed from person to person by airborne droplets through coughing or sneezing. Measles can also be spread by contact with nose and throat secretions from ill persons, or touching a contaminated surface. Infected people can spread the virus four days before their rash starts to four days after.

Measles can be prevented by the measles vaccine (usually given in combination with rubella and mumps vaccines, or MMR vaccine), and is recommended for all children at 12 to 15 months of age and again at four to six years of age. If a person has not received a second

dose of the vaccine between four and six years of age, it may be given at any age thereafter. The two doses of vaccine normally provide lifelong immunity.

Any student or employee who is determined to be infected with measles shall be prohibited from attending work or school until a health officer (licensed physician, licensed physician's assistant, health department official, school nurse, etc.) has determined that the individual is free of the condition or that there is no danger of the condition spreading to others in the school environment.

Exceptions

Students and employees with unique health circumstances may request an exception to this policy by providing a statement from a physician certifying that there is no danger of the condition spreading to others in the school environment. The district will comply with physician instructions when implementing the requirements of this policy.

Educational Services

The District will confer with the parent/guardian of any student excluded from school due to measles, and formulate a plan for homebound instruction to be provided by the District, until the student is permitted to return to school.

Reporting and Additional Information

Any District employee who suspects a measles infection through either observation of parent/guardian report should report it immediately to the county health department. While local health officials may release pertinent information about a suspected infection or confirmed infection, District employees are prohibited from disclosing information regarding the medical condition of a student or fellow employee.

Any person suspecting they have been exposed to measles should contact their healthcare provider or county health department. Additional information regarding measles and symptoms of an infection is available as follows:

Oklahoma State Department of Health
1000 NE 10th
Oklahoma City, OK 73117
(405) 271-5600
Toll free: (800) 522-0203

<https://www.ok.gov/health2/documents/Measles.2018.pdf>

WELLNESS

Muskogee Public Schools understands the importance of health and how it relates to student learning and academic achievement. All students shall receive education to foster lifelong behaviors of healthy living, including the development of nutritionally sound habits, the importance of physical activity and overall wellness.

The vision of the Muskogee Public Schools Wellness Policy is to establish an educational environment that influences healthy behaviors through nutrition standards and education, physical fitness activities and promotion, employee wellness efforts and overall holistic health.

The mission of MPS District Wellness Council is to empower faculty and students to develop healthy, positive behaviors, skills, and attitudes by providing a variety of health and wellness promotion activities and opportunities.

Muskogee Public Schools adopts the Coordinated School Health Framework that is recommended by the Center for Disease Control and Prevention and will promote the eight components of coordinated school health: Health Education; Physical Education; Health Services, Nutrition Services; Counseling, Psychological and Social Services; Health and Safe School Environment; Health Promotion for staff, family, and community involvement. With the implementation of policies and guidance from the District Wellness Council and site Healthy and Fit School Advisory Committees, the school district will offer great opportunities for our students, faculty, families, and community to build successful and healthful lifestyles. Healthy and Fit school advisory committees shall include students, parents, and community members while accepting and considering public input.

Nutritional Guidelines

School district will, at minimum, follow nutrition standards set forth by the [Healthy, Hunger Free Kids Act of 2010](#) to improve the health and well-being of the students, reinforce healthy eating habits, and increase the consumption of healthy foods and beverages throughout the school day.

The District participates in the following USDA child nutrition programs:

- National School Lunch Program
- School Breakfast Program
- After School Snack Program
- Summer Food Service Program
- Fresh Fruit and Vegetable Program

The USDA guidelines will be followed when preparing meals and snacks provided through these federally funded programs. Participation in these programs is designed to ensure

students receive plenty of fruits, vegetables, whole grains, and fat-free/low-fat milk to meet their nutrition needs. School meals are also calorically appropriate, moderate in sodium, low in saturated fat and have zero grams of trans-fat.

School Meals

- Schools must offer nutritious, well-balanced, and age appropriate meals to all children they serve to improve their diets and safeguard their health.
- Meals must be consistent with the most recent Dietary Guidelines for Americans.
- Schools will offer potable water free of charge during meal service times. Water cups/jugs will be available in the cafeteria if a drinking fountain is not present.
- Are accessible, appealing and attractive to children/students to all students
- Are served in clean and pleasant settings
- Meet or exceed current nutrition requirements established by local, state, and federal statutes and regulations
- Promote healthy food and beverage choices by:
 - ✓ Making sliced or cut fruit available daily
 - ✓ Displaying daily fruit options in students' line of sight/reach
 - ✓ Creating a reimbursable meal in all service areas (e.g., salad bars, snack rooms, etc.)
 - ✓ Bundling daily vegetable options into all grab and go meals
 - ✓ Training servers to politely prompt students to select and consume the daily vegetable options with their meal
 - ✓ Placing white milk in front of other beverages in all coolers
 - ✓ Using student surveys and taste testing opportunities to inform menu development and promotional ideas
 - ✓ Marketing menu options through daily announcements
- Students and staff will be offered a variety of skim and low fat milk, lean meat, beans, fruits, vegetables, and whole grains on a daily basis.
- At least 10 minutes for breakfast and 20 minutes for lunch will be provided from the time students are seated to allow adequate time to eat school meals.
- Food products or ingredients used to prepare meals must contain zero grams of trans fat per serving or a minimal amount of naturally occurring trans fat
- School breakfast and lunches offered to all age/grade groups must, on average over the school week, provide less than 10 percent of total calories from saturated fat and contain no trans-fat.
- Training and support will be provided for food service professionals on safe food preparation and nutrition standards.
- District Child Nutrition Services participates in Farm to School or purchases locally grown foods when available.
- The District will ensure the schools encourage students to start the day with a healthy breakfast and participate in National School Breakfast Week.

Competitive Foods and Beverages

To support healthy food choices and improve student health and well-being, all foods and beverages outside the reimbursable school meal programs that are sold to students on the school campus during the school day will meet or exceed the USDA Smart Snacks nutrition standards. These standards will apply in all locations and through all services where foods and beverages are sold, which may include, but are not limited to, à la carte options in

cafeterias, vending machines, school stores and snack or food carts. A summary of the standards and information, as well as a Guide to Smart Snacks in Schools are available at: <http://www.fns.usda.gov/healthierschoolday/tools-schools-smart-snacks>. The Alliance for a Healthier Generation provides a set of tools to assist with implementation of Smart Snacks available at www.foodplanner.healthiergeneration.org.

Regulations for foods/beverages offered/not sold; foods that are given away/provided at no cost. This includes classroom parties, school celebrations, food/beverages brought for sharing.

- **Rewards and incentives:** Foods and beverages will not be used as an immediate reward, or withheld as punishment for any reason, such as for performance or behavior. The District will provide teachers and other relevant school staff a [list of alternative ways to reward children](#). It is encouraged that teachers use physical activity as a reward.
- **Celebrations and parties:** The district strongly encourages all items offered be Smart Snack compliant or non-food items. If a non-smart snack items are offered, an equivalent amount of Smart Snack items should also be offered. A list of Smart Snack and healthy party ideas, including non-food celebration ideas is provided to parents and teachers and can be found at the [Alliance for a Healthier Generation](#) and [USDA](#).
- When packing a meal or bringing a lunch from home, students are encouraged to bring food items and snacks that meet the Dietary Guidelines of Americans and USDA Smart Snack regulations.

Water

To promote hydration, free, safe, unflavored drinking water will be available to all students throughout the school day and throughout every school campus. The District will make drinking water available where school meals are served during mealtimes.

- All water sources and containers will be maintained on a regular basis to ensure good hygiene and health safety standards. Such sources and containers may include drinking fountains, water jugs, hydration stations, water jets and other methods for delivering drinking water.
- Students will be provided drinking cups or reusable water bottles where meals are served.
- Students will be allowed to bring drinking water from home and take water into the classroom, provided that the water is in a capped container to prevent spills.

Nutrition Education and Promotion

Nutrition education and promotion positively influence lifelong eating behaviors by using evidence-based techniques and nutrition messages, and by creating food environments that encourage healthy nutrition choices and encourage participation in school meal programs. Students and staff will receive consistent nutrition messages throughout schools, classrooms, gymnasiums, and cafeterias. Nutrition promotion also includes marketing and advertising nutritious foods and beverages to students and is most effective when implemented consistently through a comprehensive and multi-channel approach by school staff, teachers, parents, students and the community. The school district supports the incorporation of school gardens into the standards-based curriculum as a hands-on, interdisciplinary

teaching tool to influence student food choices and lifelong eating habits. Schools will ensure that nutrition education is promoted to families and the community.

The District will teach, model, encourage and support healthy eating by all staff and students. Schools will provide nutrition education and engage in nutrition promotion that:

- Is designed to provide students with the knowledge and skills necessary to promote and protect their health;
- Is part of not only health education classes, but also integrated into other classroom instruction through subjects such as math, science, language arts, social sciences and elective subjects;
- Includes enjoyable, developmentally-appropriate, culturally-relevant and participatory activities, such as cooking demonstrations or lessons, promotions, taste-testing, farm visits and school gardens;
- Promotes fruits, vegetables, whole-grain products, low-fat and fat-free dairy products and healthy food preparation methods;
- Emphasizes caloric balance between food intake and energy expenditure (promotes physical activity/exercise);
- Links with school meal programs, cafeteria nutrition promotion activities, school gardens, Farm to School programs, other school foods and nutrition-related community services;
- Teaches media literacy with an emphasis on food and beverage marketing; and
- Includes nutrition education training for teachers and other staff.

Food & Beverage Marketing in Schools

The District is committed to providing a school environment that ensures opportunities for all students to practice healthy eating and physical activity behaviors throughout the school day while minimizing commercial distractions. The District strives to teach students how to make informed choices about nutrition, health and physical activity. It is the intent of the District to protect and promote student's health by permitting advertising and marketing for only those foods and beverages that are permitted to be sold on the school campus, consistent with the District's wellness policy.

Any foods and beverages marketed or promoted to students on the school campus during the school day will meet or exceed the USDA Smart Snacks in School nutrition standards.

Physical Education and Activity

MPS supports the health and well-being of the students by promoting physical education and activities that get students and faculty physically active. Physical Education classes, elementary recess, sports and various opportunities will be provided to encourage physical activity.

- Senate Bill 1876 provides for the implementation of a sequential, developmentally appropriate physical education curriculum and requires that at least 50% of the P.E. class be used for actual student physical activity preformed at a moderate or vigorous level.
- Students should be physically active the majority of the P.E. class period.
- Physical activity opportunities will be available for all students including those with special needs.

- Physical activity during the school day (including but not limited to recess, classroom physical activity breaks or physical education) will not be withheld as punishment for any reason. Principals shall communicate with teachers and faculty other forms of discipline that may be used. The district will provide teachers and other school staff with a [list of ideas for alternative ways to discipline students](#).
- Physical education/activity shall not be denied or withheld from students to complete other classroom work or activities
- Physical Education classes will be aligned with the Priority Academic Students Skills (PASS) and taught by certified personnel.
- Professional development opportunities on integrating physical education & activity into the classroom curriculum will be offered to all teachers each year and required by all Physical Education teachers.
- Principals will be encouraged to rotate special programs/assemblies so that the same student population is not adversely affected by the eliminations of their physical education programs.
- Availability of proper equipment and facilities (including playground equipment, physical activity equipment, and athletic or fitness facilities) that meet safety standards is ensured.
- Muskogee Public Schools allows the use of facilities and grounds by our students, staff and community to promote physical activity, health, and safety.
- In the event that the school or district must conduct indoor recess, teachers and staff will follow the site indoor recess guidelines that promote physical activity for students, to the extent practicable.
- Schools will allow teachers the opportunity to participate in or lead physical activities throughout the school day.
- Information about local physical activity resources and facilities such as walking trails, community parks and recreation facilities is provided to employees and families
- The District will strongly encourage teachers to use physical activity as a reward.

Active Transport

The District will support active transport to and from school, such as walking or biking. The District will encourage this behavior by engaging in six or more of the activities below; including but not limited to: [District will select from the list below and insert them here as policy].

- Designate safe or preferred routes to school
- Promote activities such as participation in International Walk to School Week, National Walk and Bike to School Week
- Instruction on walking/bicycling safety provided to students
- Promote safe routes program to students, staff, and parents via newsletters, websites, local newspaper
- Use crossing guards
- Use crosswalks on streets leading to schools
- Use walking school buses

Other School-Based Activities

The Principal at each school site will designate a school employee to ensure Wellness Policy compliance at their site and will report the employee's title to the district wellness policy official, the Nutrition Education Coordinator.

Fundraising:

School fundraising activities that include the sale of healthy foods, beverages, and non-food items are a public display of Muskogee School's commitment to promote healthy behaviors to our students, families, and community while helping organizations meet financial needs.

- Each school site must designate a Smart Snack contact person for all exempt fundraisers. They are responsible for maintaining up-to-date documentation regarding each exempt fundraiser at their site.
- Fundraisers that involve the sale of food items during the school day are to be in compliance with the Smart Snack standards listed in this policy.
- Fundraisers held during non-school hours, weekends, or at an off-campus fundraising event are encouraged to follow the same standards to support healthy behaviors.
- Fundraisers are prohibited from taking place while meals are being served to students. This includes National School Breakfast Program and National School Lunch Program.
- Schools will encourage fundraising activities that promote physical activity.

Healthy and Fit School Advisory Committee:

Per Oklahoma Senate Bill 1627:

- Each school site will establish a Healthy and Fit School Advisory Committee that meets and makes recommendations to the school principal. The school principal shall give consideration to recommendations made by the Healthy and Fit School Advisory Committee.
- The Healthy & Fit School Advisory Committee at each school site will study and make recommendations regarding health education, nutrition, and health services.
- The Healthy and Fit School Advisory Committee at each school site will study and make recommendations regarding physical education and physical activity.

Employee Wellness

Muskogee Public Schools will strive to establish a sustainable Employee Wellness program that provides wellness education, activities, and learning opportunities to better the health of all employees. The program should promote health, reduce health risk behaviors of employees, and identify and correct conditions in the workplace that can compromise the health of school employees, reduce their levels of productivity, impede student success, and contribute to escalating healthcare costs.

- School staff will be encouraged to display healthy eating habits and physical activity choices to students.
- The District promotes staff member participation in health promotion programs and will support programs for staff members on healthy eating/weight/stress management that are accessible and free or low-cost.

- The District will partner with local community organizations and agencies to offer voluntary health screenings, health assessments, stress management and immunization clinics.
- Free of low cost first aid and CPR training is offered.

Wellness Policy Implementation, Monitoring, Accountability and Community Engagement

Implementation Plan

The District will develop and maintain a plan for implementation to manage and coordinate the execution of this wellness policy. The plan delineates roles, responsibilities, actions and timelines specific to each school; and includes information about who will be responsible to make what change, by how much, where and when; as well as specific goals and objectives for nutrition standards for all foods and beverages available on the school campus, food and beverage marketing, nutrition promotion and education, physical activity, physical education and other school-based activities that promote student wellness.

This wellness policy and the progress reports can be found at: www.mpsi20.org

Recordkeeping

The District will retain records to document compliance with the requirements of the wellness policy within the Child Nutrition Department. Documentation maintained in this location will include but will not be limited to:

- The written wellness policy;
- Documentation demonstrating that the policy has been made available to the public;
- Documentation of efforts to review and update the Local Schools Wellness Policy; including an indication of who is involved in the update and methods the district uses to make stakeholders aware of their ability to participate on the DWC;
- Documentation to demonstrate compliance with the annual public notification requirements;
- The most recent assessment on the implementation of the local school wellness policy;
- Documentation demonstrating the most recent assessment on the implementation of the Local School Wellness Policy has been made available to the public.

Annual Notification of Policy

The District will actively inform families and the public each year of basic information about this policy, including its content, any updates to the policy and implementation status. The District will make this information available via the district website and/or district-wide communications. Annually, the District will also publicize the name and contact information of the school official leading and coordinating the committee, as well as information on how the public can get involved with the school wellness committee.

Triennial Progress Assessments

At least once every three years, the District will evaluate compliance with the wellness policy to assess the implementation of the policy and include:

- The extent to which schools under the jurisdiction of the District are in compliance with the wellness policy;
- The extent to which the District's wellness policy compares to the Alliance for a Healthier Generation's model wellness policy; and
- A description of the progress made in attaining the goals of the District's wellness policy.

The position/person responsible for managing the triennial assessment and contact information is the Nutrition Education Coordinator, Child Nutrition Services.

The District, in collaboration with individual schools, will monitor schools' compliance with this wellness policy.

Revisions and Updating the Policy

The District Wellness Council will update or modify the wellness policy based on the results of the triennial assessments and/or as District priorities change; community needs change; wellness goals are met; new health science, information, and technology emerges; and new Federal or state guidance or standards are issued. The wellness policy will be assessed and updated as indicated at least every three years, following the triennial assessment.

Community Involvement, Outreach and Communications

The District is committed to being responsive to community input, which begins with awareness of the wellness policy. The District will actively communicate ways in which representatives of DWC and others can participate in the development, implementation and periodic review and update of the wellness policy through a variety of means appropriate for that district. The District will use electronic mechanisms, such as email or displaying notices on the district's website, as well as non-electronic mechanisms, such as newsletters, presentations to parents, or sending information home to parents, to ensure that all families are actively notified of the content of, implementation of, and updates to the wellness policy, as well as how to get involved and support the policy. The District will actively notify the public about the content of or any updates to the wellness policy annually, at a minimum. The District will also use these mechanisms to inform the community about the availability of the annual and triennial reports.

SMOKING, VAPING, AND THE USE OF TOBACCO PRODUCTS

The board is dedicated to providing a healthy, comfortable, and productive environment for staff, students, and citizens. The board believes that education has a central role in establishing patterns of behavior related to good health and that measures are necessary to help its students to resist tobacco use. The board is concerned about the health of its employees and also recognizes the importance of adult role-modeling for students during formative years. Therefore, the board shall discourage the use of tobacco products by its staff and students. The district will refer employees, parents/guardians, family members, and students (13 and older) interested in quitting tobacco use to the Oklahoma Tobacco Helpline and other available cessation resources.

Tobacco on Campus

Smoking, vaping and the use of tobacco products or vapor products in any form is prohibited on district property by all persons. This prohibition includes school buildings, grounds, and school-owned vehicles. Possession of tobacco products or vapor products by students on school property is prohibited. This policy also applies to students and staff at any off-site, school sponsored meeting or event, including, but not limited to, field trips and athletic events.

Marijuana on Campus

Smoking, vaping, or possessing marijuana (as defined in Board of Education Policy, *Medical Marijuana, Hemp & Cannabidiol (CBD)*) on District property is strictly prohibited. Refer to the District's policy on *Medical Marijuana, Hemp & Cannabidiol (CBD)* for further information.

Posting Signs Pursuant to this Policy

At or near each entrance of every district building the following sign shall be conspicuously posted: Tobacco or Marijuana Smoking or Marijuana Vaping is Prohibited.

Definitions

"Tobacco products" includes, but is not limited to: cigarettes, cigars, loose tobacco, rolling papers, chewing tobacco, snuff, matches and lighters.

"Vapor product" includes noncombustible products that may or may not contain nicotine, that employ a mechanical heating element, battery, electronic circuit or other mechanism, regardless of shape or size, that can be used to produce a vapor in a solution or other form. "Vapor product" shall also include any vapor cartridge or other container with or without nicotine or other form that is intended to be used with an electronic cigarette, electronic cigar, electronic cigarillo, electronic pipe or similar product or device and any vapor cartridge or other container of a solution, that may or may not contain nicotine, that is

intended to be used with or in an electronic cigarette, electronic cigar, electronic cigarillo or electronic device. "Vapor product" does not include any products regulated by the United States Food and Drug Administration under Chapter V of the Food, Drug and Cosmetic Act.

"Smoking" means the carrying by a person or having access to a lighted cigar, cigarette, pipe or other lighted smoking article. Smoking also includes using products which mimic or simulate smoking behavior, regardless of whether such products actually contain tobacco. This prohibition includes but is not limited to vapor products as defined in this policy.

Enforcement

The success of this policy will depend upon the thoughtfulness, consideration, and cooperation of smokers and non-smokers. All individuals on school premises share in the responsibility for adhering to and enforcing this policy. Any individual who observes a violation on school property may report it in accordance with the procedures listed below.

Students

Any student using, possessing or distributing tobacco products or vapor products in violation of this policy will be subject to appropriate disciplinary measures, including out-of-school suspension, pursuant to the board's policies regarding student discipline.

Staff

Any violation of this policy by staff will be referred to the appropriate supervisor. One written warning will be issued to the staff member with a copy placed in his or her district personnel file. Further violations will be considered willful neglect of duty and will be dealt with accordingly based on established policies and procedures for suspension, demotion, dismissal and non-renewal of staff.

Citizens

Citizens who are observed smoking or using tobacco products or vapor products on district property in violation of this policy will be asked to refrain from using these products on school property. If the individual fails to comply with the request, his or her violation of policy may be referred to the building principal or other district supervisory personnel responsible for the area or program during which the violation occurred. The supervisor shall make a decision on further action which may include a directive to leave school property. Repeated violations may result in a recommendation to the superintendent or board of education to prohibit the individual from entering district property for a specified period of time. If deemed necessary by the school administration or the board of education, local law enforcement officials may be called upon to assist with enforcement of this policy.

Reference: 70 O.S. §§ 1210.212, 1210.213

MUSKOGEE PUBLIC SCHOOLS
BOARD OF EDUCATION POLICY

Business and Auxiliary Services
103350

Adopted: August 20, 2019

CUSTODIAL AND NONCUSTODIAL PARENTAL RIGHTS

It is the policy of the board of education that a parent who is awarded legal custody of a child by court action shall file a copy of the court decree awarding such custody with the school. If the custodial parent does not wish the child to be released to the noncustodial parent, an appropriate written instruction should also be filed with the school.

All staff members are instructed to refer any questions to the appropriate building principal or the superintendent.

Absent a court order to the contrary, both natural parents have the right to view the student's school records; to receive school progress reports; to visit the child briefly at school; and to participate in parent and teacher conferences (not necessarily together in the same conference).

Reference: 43 OKLA. STAT. §109-6

SCHOOL VOLUNTEERS

The board encourages community members to volunteer at the district's schools to augment its programs. The board has adopted this policy to clarify requirements, expectations and responsibilities related to volunteering for the school district.

The district does not discriminate against volunteers on the basis of race, color, sex, pregnancy, gender, gender expression or identity, national origin, religion, disability, veteran status, sexual orientation, age, or genetic information. All individuals who volunteer for the district should be committed to the district's non-discrimination requirements and its goal of providing quality education and related programs to the children of the community.

The district has a myriad of needs which can be filled by volunteers, and any individual interested in being a school volunteer should contact the School Site Principal to begin the volunteer approval process. Prior to volunteering, all volunteers are required to:

- submit an information form
- authorize a criminal records check
- pay the records check fee (fee may be waived in cases of demonstrated financial hardship)
- review relevant school policies
- sign the volunteer compliance agreement

No individual will be permitted to volunteer until all of the required paperwork has been submitted and the criminal records check has been reviewed and approved by the School Site Principal. In the event the criminal records check reveals adverse information regarding the potential volunteer, the administration will review the facts and circumstances to determine whether an exception can be granted and in what capacity, if any, the individual may be permitted to volunteer. All potential volunteers will be given the opportunity to explain any adverse information which is discovered during the criminal records check prior to an application being denied.

In addition to the foregoing, there are also special considerations for volunteers who are driving on school field trips or who are volunteering in connection with athletic events. Individuals who transport students in personal vehicles are required to provide additional documentation and declarations related to their driving history and insurance. Individuals who volunteer in connection with athletic events are required to participate in sport-specific education programs.

DISTRICT WIDE PARENTAL INVOLVEMENT
(Parents' Bill of Rights)

The board supports parents' efforts to be involved in the district's education programs. This policy outlines the district's efforts to educate parents and support parent involvement in response to the 2014 Parents' Bill of Rights.

Parents have the right be involved in their minor child's education, including directing that education. Parents are encouraged to exercise their rights in conjunction with district guidance so as not to inadvertently impede their minor child's compliance with federal and state mandated requirements – including requirements related to graduation. Parents also have the right to review school records related to their minor child.

Parents generally have the right to consent prior to an audio or video recording being made of their minor child. This right does not preempt the district's right to make recordings (without specific parental approval) related to:

- safety, general order and discipline
- academic or extracurricular activities
- classroom instruction
- security/surveillance of the buildings or grounds
- photo ID cards

Parents have the right to receive prompt notice if their minor child is believed to be the victim of a crime perpetrated by someone other than the parent, unless law enforcement or DHS officials have determined that parental notification would impede the related investigation. These notice provisions do not apply to matters which involve routine misconduct typically addressed through student discipline procedures. School personnel will not attempt to encourage or coerce a child to withhold information from parents.

1. The district will promote parent participation at the site level with the goal of improving parent and teacher cooperation in areas such as homework, attendance and discipline. This will be accomplished through activities such as:

- Parent teacher conferences
- Back to school / meet the teacher nights
- Parent University
- District sponsored webpages with class information available to parents
- School newsletters

2. The district will inform parents about their children's course of study by disseminating this information:

- During annual enrollment
- In student handbooks
- On the district's webpage
- Parent University

Parents may review learning materials affecting their minor children's course of study, including supplemental materials, by making a request through the building principal.

3. Parents who object to a learning material or activity may withdraw their minor child from the class or program in which the material is used. In order to withdraw a student, the parent must submit a written request, signed and dated by a parent, to the building principal. Parents who choose to withdraw their minor child from a required class are responsible for making alternate arrangements for the child to earn credit for the class.
4. The district offers sex education in grades 5 and 6. Parents who object to their minor child participating in the district's sex education program must submit a written notice, signed and dated by a parent, to the principal in order for their child to be excused from participation. Students who are not participating in the district's sex education program will be permitted to study in the school library or office during sex education instruction.
5. If a teacher is going to provide instruction or presentations regarding sexuality in a course apart from formal sex education, the teacher will send written notice home to parents 10 (ten) days in advance of the presentation. Parents who object to their minor child's participation in such instruction may send a written request to the building principal to have the student excused from the presentation. Any such student will be permitted to study in the school library or office during the presentation.
6. Parents may learn about the nature and purpose of clubs and activities which are part of the school curriculum by reviewing student handbooks and the district's website. The district's extracurricular clubs and activities are also published in student handbooks, the district's newsletters, and are available on the district's website.
7. Parents have numerous rights and decision making responsibilities concerning their minor children. To assist parents in meeting these responsibilities and to fulfill its obligations under the 2014 Parent Bill of Rights, the district has compiled the following information for parents:
 - A. The district provides sex education to students in grades 5 and 6. Parents may opt their student out of the district's sponsored sex education program by following the procedures established in item 4 above.
 - B. Parents who are not residents of the district may enroll their minor children in the district's schools in accordance with the district's open transfer policy. A copy of that policy is available in the superintendent's office.

- C. The district utilizes a number of resources to educate students. Parents who object to an assignment based on sex, morality or religion may opt their minor child out of the assignment by following the procedures established in item 3 above.
- D. Students are generally required to receive a predetermined set of immunizations prior to enrolling in school and to receive additional boosters throughout enrollment in the district. This requirement may be waived if the parent submits a note from the minor child's physician stating that the child should be excused from the immunization for health reasons or if the parent submits a note objecting to the immunization of the child.
- E. Students are required to meet certain obligations in order to be promoted to a subsequent grade, particularly with regard to learning to read. Parents can learn about these requirements – including efforts the district will take in order to help students become successful readers – by reviewing the district's policies on Reading Sufficiency Act testing, and student promotion. Copies of these policies are available in the superintendent's office.
- F. Students are required to meet certain obligations in order to graduate from high school. Parents can learn about these requirements each year during course enrollment. This information is also available in student handbooks and on the Oklahoma State Department of Education's website (www.ok.gov/sde/).
- G. The district provides AIDS education for students in grades 7 and 12. Parents may opt their minor student out of this education by submitting a written request, signed and dated by a parent, to the building principal. Students who are not participating in the district's AIDS education program will be permitted to study in the school library or office during the scheduled instruction.
- H. Parents have the right to review student test results related to their minor student. Parents may review the results of classroom exams by contacting their child's teacher. Parents may review the results of state-wide testing by contacting their child's building principal.
- I. Qualifying students have the right to participate in the district's gifted and talented program in accordance with the district's policy regarding the program. A copy of the policy is available through the superintendent's office.
- J. Parents have the right to review teachers' manuals, films, tapes or other supplementary instructional material if the materials are being used in connection with a research or experimentation program or project. In order to review these materials, the parent should contact the building principal.
- K. Parents have the right to receive a school report card. Information regarding these report cards will be provided through school publications, but a copy of the actual report card is available in the superintendent's office.

- L. Students are required to attend school regularly, and the district is required to notify parents of any student absence unless the parent has already contacted the school to report the absence. The district will send a written notice to parents if their minor student appears to be in danger of exceeding the maximum allowable number of absences and will notify the district attorney and the parent if a child may be considered truant. Parents may contact the child's principal for additional information regarding student absences.
- M. Parents have the right to review the district's courses of study and textbooks. Arrangements for this review can be made through the building principal.
- N. Students may be excused from school for religious purposes provided the parent contacts the building principal to request such an absence.
- O. Parents have the right to review all district policies, including parental involvement policies. Copies of these policies are available through the superintendent's office.
- P. Parents have the right to participate in parent-teacher organizations. Information regarding these groups will be made available during activities such as enrollment, schedule pickups and back to school night. Parents who wish to have additional information regarding these groups can obtain more detail through the principal's office.
- Q. Parents may opt out of selected district level data collection related to state longitudinal student data system reporting. Parents may not opt out of necessary and essential record collecting. Parents may file an opt out request through the superintendent's office.
- R. The district will not procure, solicit to perform, arrange for the performance of, perform surgical procedures or perform a physical examination upon a minor student or prescribe any prescription drugs to a minor student without first obtaining a written consent for the proposed assessment or treatment. The written consent will be effective for the school year for which it was granted, and must be renewed each subsequent school year. If the assessment or treatment for which the written consent is provided is performed through telemedicine at a school site, and if the written consent is provided by the Parent and is currently effective, the health professional shall not be required to verify that the parent is at the school site.
- S. The district will not procure, solicit to perform, arrange of the performance of or perform an assessment for mental health therapy on a minor student without first obtaining consent of a parent or legal guardian of the minor. The written consent will be effective for the school year for which it was granted, and must be renewed each subsequent school year. If the assessment or treatment for which the written consent is provided is performed through telemedicine at a school site, and if the written consent is provided by the Parent and is currently effective, the health professional shall not be required to verify that the parent is at the school site. However, a student shall not be seen without consent.

- T. A student shall not be vaccinated at school or on school grounds or receive a vaccine as part of the mobile vaccination effort without prior written authorization, including the signature of the parent or legal guardian of the student for the vaccine or group of vaccines to be administered during a single visit.

Parents requesting information outlined in this policy should submit written requests for information through the building principal or superintendent's office, as noted in the respective section. Appropriate school personnel will either make the information available or provide a written explanation of why the information is being withheld within ten (10) days of the request. Any parent whose request is denied or who does not receive a response within fifteen (15) days may submit a written request for the information to the board of education. The board will include an item on its next public meeting agenda (or the following meeting, if time does not permit inclusion of the item on the agenda) to allow the board to formally consider the parent's request.

OKLA. STAT. tit. 70 §1-116.2

OKLA. STAT. tit. 25 § 2001

OKLA. STAT. tit. 25 §2004, et seq.

DISTRICT WIDE PARENTAL AND FAMILY ENGAGEMENT POLICY
(Title I, Part A Programs)

Part I **General Expectations**

The purpose of this policy is to establish the district's expectations for parental involvement. Pursuant to the Every Student Succeeds Act ("ESSA") Section 1116, Public Law 114-95. The District agrees to implement the following statutory requirements:

1. The District will put into operation programs, activities, and procedures for the engagement of parents in all of its schools with Title I, Part A programs, consistent with the Section 1116 of the ESSA. All programs, activities and procedures shall be planned and operated with meaningful consultation with parents of participating students.
2. The District will involve parents and family members in jointly developing the District's plan under Section 1112 of the ESSA, and development of support and improvement plans in accordance with Section 1111(d) of the ESSA; provide all supports necessary to effectively implement parent/family involvement; integrate parent/family engagement strategies with Federal, State and local laws/programs; conduct an annual evaluation of the program effectiveness.
3. The District will reserve at least one percent of its allocation to assist schools in carrying out parent and family engagement activities; parents will be involved in decisions regarding how funds will be allocated/distributed for site activities.
4. The District will develop and distribute the parent and family engagement-policy to parents and community members in an understandable and uniform format, to extent practicable. This policy will be updated periodically to meet the changing needs of parents and the school.
5. Each school served under this policy will convene an annual meeting; offer a flexible number of meetings; involve parents, in an organized, ongoing, and timely way, in the planning, review, and improvement of programs, including the planning, review, and development of the District-wide program plan under Section 1114(b) of the ESSA.
6. The school will jointly develop with parents the school compact that outlines how parents, the entire school staff and the students will share the responsibility for improved student academic achievement. The compact shall:

- a. Describe the District's responsibility to provide high-quality curriculum and instruction in a supportive and effective learning environment, and ways each parent will be responsible for supporting their student's learning.
 - b. Address the importance of communication between teachers and parents on an ongoing basis.
7. To ensure effective involvement of parents and to support a partnership among the school involved, parents and community members to improve student academic achievement, each school and the District will:
- a. Provide assistance to parents of students served by the District, as appropriate, in understanding Oklahoma State Standards, academic assessments, and how to monitor student progress.
 - b. Provide materials and training to help parents to work with their student to improve their student's achievement.
 - c. Will educate teachers and staff in the value and utility of parent contributions, how to communicate and work with parents as equal partners, implement parent programs, and build ties between parents and the District.
 - d. Will coordinate and integrate parent involvement programs/activities with Federal, State, and local programs, and encourage parent participation.
 - e. Ensure that information related to school/parent programs, meetings, and activities is sent to parents in a format and language the parents understand.
 - f. Provide reasonable support for parental involvement activities under the section as parents may request.
8. The District will provide opportunities for the informed participation of parents and family members, including providing information and school reports required under Section 1111 of the ESSA in a format and, to the extent practicable, in the language of the parent.

Part II District Implementation of District Wide Parental Involvement Policy

The district will implement or accomplish each of the following components under ESSA (Public Law 114-95, Section 1116).

- 1. The district will take the following actions to involve parents in the joint development of its District-wide parental involvement plan under section 1112 of ESSA:
Annual reviews, evaluations, committee meetings, parent-teacher conferences, parent activities
- 2. The District will take the following actions to ensure that 1% of allocation is set-aside for parental involvement activities:

Funds will be set-aside before site allocations are issued

3. The District will distribute the parent engagement-policy to all parents through:

Annual distribution, translated into native language, through email, website, flyers, newsletters, parent meetings

4. The District will adhere to the parent engagement-policy and ensure involvement through:

Flexible and timely parent meetings

5. The District will jointly develop and distribute school-wide parent compacts through:

Parent meetings and workshops, parent/teacher conferences and the District's website

6. The District will ensure effective involvement of parents and support a partnership among the school involved, parents, and the community to improve student academic achievement through:

Surveys (parent feedback), parent meetings, annual review of District plans and programming

7. The District will inform parents and family members of activities, meetings, and other opportunities for involvement, including providing information and school reports required under Section 1111 of the ESSA in a format and, to the extent practicable, in the language of the parent through:

Translation of documents, parent meetings, newsletters, the District's website, social media, phone calls, flyers and brochures

REVIEW OF INSTRUCTIONAL MATERIAL

In order to promote transparency in the education process, the district's instructional materials will be available for parent review. Instructional materials include items such as teacher manuals, films, tapes and other supplementary materials regardless of format.

In order to review these materials, a parent should submit a written request to the building principal. The request must specify the class/subject, teacher, student's name, and the types of items being requested for review. Within ten (10) days the principal will arrange for a mutually convenient time for the review or will notify the parent that a review cannot be permitted. If the principal declines to allow a parent to review the materials, the principal will provide the parent with an explanation of why the material is not available. All reviews will be conducted between the hours of 8:30 a.m. and 3:30 p.m. in the Education Service Center. Instructional materials may not be removed from Education Service Center.

In the event the requested review is denied or after fifteen (15) days with no response from the principal, the parent may request this information through the board of education in accordance with the district's policy regarding parent rights.

OKLA. STAT. tit. 70 § 11-106.1

**SAFE SCHOOL COMMITTEES AND
HEALTHY AND FIT SCHOOL ADVISORY COMMITTEES**

Safe School Committees

This policy will govern the operation of the district's safe school committees .

1. Each site principal will annually establish a Safe School Committee of at least seven (7) members. Members may be employees, parents, students, volunteers, community members and/or local law enforcement officials. All members of each Safe School Committee shall serve until the following June 30 unless earlier removed from the Committee by the principal for any reason. The principal who appoints the Safe School Committee members shall advise the superintendent, in writing, of the names, addresses and phone numbers of the committee members. In case of a resignation, death or removal of any Committee member, the principal shall immediately appoint a successor Committee member so as to maintain the composition of the Committee as set forth above. Committee members are eligible to serve consecutive terms.
2. The Committee will assist the board in promoting a positive school environment through planning, implementing and evaluating effective prevention, readiness and response strategies.
3. Each Safe School Committee shall study and make recommendations, in writing, to the school principal regarding:
 - Unsafe conditions, possible strategies for students to avoid harm at school, student victimization, crime prevention, school violence and other issues that prohibit the maintenance of a safe school, and student bullying;
 - Professional development needs of faculty and staff to recognize and avoid bullying and implement methods to decrease student bullying;
 - Professional development needs of faculty and staff to recognize and report suspected human trafficking;
 - Methods to encourage the involvement of the community and students, the development of individual relationships between students and school staff, use of problem-solving teams that include counselors and/or school psychologists, and ways to utilize behavioral health resources, including suicide prevention resources.

As part of the process, each Committee shall review the district's policies, traditional and accepted bullying prevention programs utilized by other states, state agencies or school districts, and the bullying resources provided on the Oklahoma State Department of Education's website.

4. Each Safe School Committee shall meet at least once each semester. Each Committee shall appoint a committee chairperson who shall maintain written minutes of each meeting. The Committee chairperson will be responsible for notifying all Committee members of meetings, preparing agendas for each meeting and posting the agendas in the principal's office for a reasonable period prior to the date and time of each meeting. The principal of each school site will retain all agendas, minutes and other documents related to the Safe School Committee.
5. Prior to the last day of school of each school year, each Safe School Committee shall make a written report to the school principal. The school principal shall transmit a copy of the report to the superintendent. The superintendent shall maintain the reports in the records of the district and shall transmit a copy of each Safe School Committee report to each district board member.
6. Committees may also, if they deem it appropriate, make recommendations to the board regarding the development of a rape / sexual assault program for implementation at the school site. The board will consider any such recommendations to determine whether implementation of the recommended or an alternative program is warranted.

Healthy and Fit School Advisory Committees

The district also establishes Healthy and Fit School Advisory Committees, which shall be combined with the district's Safe Schools Committees. The Healthy and Fit School Advisory Committees are established pursuant to OKLA. STAT. tit. 70, § 24-100a, which created the *Healthy and Fit Kids Act of 2004*.

The Committees shall be composed of no fewer than six (6) individuals who may be the same individuals appointed to the district's Safe School Committees. The composition of the Advisory Committees may include teachers, administrators, parents of students, health care professionals and business community representatives.

The Advisory Committee at each school site shall study and make recommendations to the school principal regarding:

1. Health education;
2. Physical education and physical activity; and
3. Nutrition and health services.

School principals shall give consideration to the recommendations of their respective advisory committees. The Advisory Committee, for purposes of timelines, shall follow the same schedule as established for the district's Safe School Committees.

Reference: 70 OKLA. STAT. §24-100.5, 70 OKLA. STAT. §24-100a

**INTERFERENCE WITH THE
PEACEFUL CONDUCT OF SCHOOL DISTRICT ACTIVITIES
AND PROTECTION FROM WORKPLACE HARASSMENT AND VIOLENCE**

1. Interfering with Peaceful Conduct

The superintendent or anyone designated by the superintendent or the board of education to maintain order in the school district shall have the authority and power to direct any person to leave school district property or any school activity when students are present, who is not a student, officer or employee thereof, and who:

1. Interferes with the peaceful conduct of activities on school district property;
2. Interferes with the peaceful conduct of school activities off school district property when students are present;
3. Commits an act that interferes with the peaceful conduct of activities on school district property;
4. Commits an act that interferes with the peaceful conduct of school activities off school district property when students are present;
5. Enters school district property for the purpose of committing an act that may interfere with the peaceful conduct of activities on school district property;
6. Enters non-school district property when students are present for the purpose of committing an act that may interfere with the peaceful conduct of school activities

For purposes of Section I of this policy, conduct that “interferes with the peaceful conduct of activities on school district property” includes, but is not limited to, actions that directly interfere with any student activities, classes, study, student or faculty safety, housing or parking areas or extracurricular activities or any lawful activity; threatening or stalking any person; damaging or causing waste to any property belonging to another person or the school district; or direct interference with administration, maintenance or security of property belonging to the school district.

Any person to whom this policy applies, who fails to leave a premises as directed or returns within six (6) months thereafter, without first obtaining written permission from the superintendent or anyone designated by the superintendent or the board of education, shall be guilty of a misdemeanor.

Appeal Process

After receiving a directive to leave the premises under this policy, the person issued the directive may request reconsideration by taking the following steps:

The person may request review of the initial decision by letter to the superintendent. If no written request is received within five (5) calendar days of the person's receipt of written notification of the directive to leave the premises, the directive will be final and nonappealable. If the superintendent issued the initial directive to leave the premises, the superintendent will appoint another administrator to review his/her decision. The decision of the superintendent or his/her designee will be final and nonappealable.

The superintendent or person who issues the directive to leave the premises will give the person to whom the directive is issued a copy of this policy within a reasonable amount of time after issuing the directive. During any appeal process, the person given the directive to leave the premises must remain off school property and away from school activities, whether on school district property or not, unless the superintendent, in writing, instructs that the directive is to be stayed pending the appeal process.

II. Disturbing, Interfering, or Disrupting School District Business

- A. **Disturbing, interfering or disrupting.** Any person, alone or in concert with others and without authorization, who willfully disturbs, interferes or disrupts 1) school district business, including any publicly posted meetings; or 2) school district operations; or 3) any school district employee, agent, official, or representative, shall be guilty of a misdemeanor.
- B. **Refusing to leave property.** Any person who is without authority or who is causing any disturbance, interference or disruption who willfully refuses to disperse or leave any property, building, or structure 1) owned, leased, or occupied by the school district or its employees, agents or representatives; or 2) used in any manner to conduct school district business or operations after proper notice by a peace officer, sergeant-at-arms, or other security personnel, shall be guilty of a misdemeanor.
- C. **Definition of "disturb, interfere or disrupt."** For purposes of Section II of this policy, the term "disturb, interfere or disrupt" means any conduct that is violent, threatening, abusive, obscene, or that jeopardizes the safety of self or others.

III. School District Power to Petition the District Court Regarding Workplace Harassment and Violence

Workplace harassment and violence are unacceptable and should not be tolerated. Pursuant to OKLA. STAT. tit. 12 §1398, the board of education of the school district may authorize the initiation of an action in a District Court of Oklahoma seeking injunctive and other available relief to address workplace harassment and/or violence. Seeking an injunction pursuant to §1398 shall not limit any other action or

recourse the Superintendent and school district may have under law and school district policy.

References: OKLA. STAT. tit. 21 §§ 1375, 1376
OKLA. STAT. tit. 70 §§ 24-131, 24-131.1
OKLA. STAT. tit. 12 § 1398
OKLA. STAT. tit. 21, § 2011

SEX OFFENDERS

Because a safe learning environment promotes academic and social growth, the district desires to protect students at school from those who might expose students to inappropriate acts of a sexual nature. Those required to register with the state as sex offenders have committed acts totally incompatible with a safe learning environment. Accordingly, registered sex offenders are prohibited from being on any district property or attending district-sponsored activities at all times, and administrators are authorized to direct such offenders off district property and to notify law enforcement for noncompliance with that directive.

Limited Exception for Parent/Guardian

If the registered sex offender is the custodial parent or legal guardian of a child who is enrolled at the district, the registered sex offender may only enter district grounds to:

- enroll their child, after prior notice to the site principal
- deliver or retrieve their child during normal school hours
- deliver or retrieve their child from a district-sponsored extracurricular activity

While performing these delivery/retrieval functions, the registered sex offender may not exit his/her vehicle (unless prior approval has been granted by the site principal). The registered sex offender, who is the parent or legal guardian of a child who is enrolled at the district, may not be on district property or at a district function at any other time. Registered sex offenders who are custodial parents or legal guardians of a child who is enrolled at the district will receive communications about their child by phone, letter or e-mail instead of in-person communication with district personnel.

SAFETY DRILLS

The board of education has appointed a committee composed of the superintendent and other designated personnel for the purpose of developing and maintaining the district's emergency plans. A crisis plan will be developed by local officials and the Safe School Committee to provide guidance for those responsible for the safety of students and property.

A minimum of 10 safety drill activities per year will be planned and implemented by the superintendent, the fire marshal, or other civil authorities to ensure orderly movement of students to the safest available space(s) should an emergency occur. Whenever drills occur, all individuals on campus will fully participate in the drills. The following drills will be conducted each school year:

- Security (4 drills per year at different times of day; 1 drill within the first 15 days of the start of each semester and 1 other drill per semester)
- Fire (1 drill within the first 15 days of the start of each semester)
- Tornado (1 drill in September and 1 drill in March)
- Other drills such as security, fire, tornado, terrorism, suicide, weapons, etc. (2 drills per year)

The superintendent will maintain communication with other community agencies in order to share information on preparedness and planned procedures. It is the responsibility of the superintendent to ensure that the schools work in cooperation with these other agencies during such emergencies. Building principals are responsible for documenting each of the safety drills which are conducted and filing a copy of the documentation at the school site, with the district's administrative office, and with the Oklahoma School Security Institute.

Emergency preparedness will be discussed with teachers and students at least once per semester or as deemed necessary by the building administration. Each classroom shall post a copy of rules, evacuation signals, evacuation routes and emergency procedures. Teachers will discuss these procedures with each class using the room during the first day(s) of the school year.

All teachers and staff members shall make themselves familiar with safety procedures. During an actual emergency or a safety drill, teachers are responsible for following all procedures, including ensuring that doors and windows are closed appropriately, electrical circuits and gas jets are turned off, order is maintained, and all students are either accounted for or promptly reported missing to the building principal.

In the case of building evacuations, all meeting areas will be at least 50 feet away from buildings and driveways.

Reference: OAC 210:35-13-115, OKLA. STAT. tit. 70 § 5-149

DISTRIBUTION OF MATERIALS

In order to ensure student safety and the orderly operation of the school, non-school materials (fliers, booklets, magazines, buttons, announcements, signs, etc.) will only be distributed to district students under limited circumstances. All school sites will provide notice of the proper procedures for the distribution of materials. Permission to distribute materials is not an endorsement of the content of the materials either by the individual granting the permission or the board of education.

This policy does not apply to official school publications, such as yearbooks or student newspapers, and does not apply to signs posted for events such as STUCO elections.

Authorized Groups

Authorized Groups include district recognized parent-teacher organizations and school sponsored student organizations, programs, and activities. These Authorized Groups may distribute materials to students in any grade as long as these materials are related to the Authorized Group's mission.

Other Individuals and Groups

Other Individuals and Groups (Others) may not distribute materials directly to students younger than 9th grade. Others may distribute materials directly to students at the high school level with the superintendent's prior approval. Others may also request that the district distribute materials to students in any grade by contacting the superintendent. The superintendent has final authority in determining whether the materials are appropriate for distribution and the terms and conditions for the distribution. The following criteria will be used in the superintendent's consideration of the request:

- Materials which are of educational value to students should be considered for distribution;
- Materials which provide notice of a community service or event likely to be of value to students and families may be considered for distribution;
- Materials which are of a political or commercial nature will generally not be considered for distribution, unless there is a compelling reason that the material should be distributed;
- Materials which are inappropriate for the education environment will not be considered for distribution, including materials which:

- Are obscene to minors - (a) material which, taken as a whole, lacks serious literary, artistic, political or scientific value for minors and, (b) when an average person, applying contemporary community standards, would find that the material, taken as a whole, appeals to an obsessive interest in sex by minors of the age to whom distribution is directed;
- Are libelous - a false and unprivileged statement about a specific individual which tends to harm the individual's reputation;
- Are vulgar, lewd or indecent - material which, taken as a whole, an average person would deem improper for presentation to minors because of sexual connotations or profane language;
- Display or promote unlawful products or services - material which advertises or advocates the use of products or services prohibited by law from being sold or provided to minors;
- Defames any group - material which disparages a group or a member of a group on the basis of race, color, sex, pregnancy, gender, gender expression or identity, national origin, religion, disability, veteran status, sexual orientation, age, or genetic information – including racial and religious epithets, “slurs,” insults and abuse;
- Disrupts school operations - material which, on the basis of past experience or based on specific instances of actual or threatened disruptions relating to the written material in question, is likely to cause a material and substantial disruption of the proper and orderly operation of school activities or school discipline.

If distribution is approved the superintendent or his/her designee shall designate the appropriate time, method, and location of distribution of the materials.

Students

Students may distribute materials at building entrances and exits 30 minutes before the start of the school day and 30 minutes after the conclusion of the day, and in the cafeteria during lunch periods. Students may also distribute materials at the entrances and exits of school facilities (gyms, stadiums, auditoriums, etc.) when those facilities are being used for a school sponsored activity.

The content of any student distributed materials must be appropriate, as outlined above.

Students may not distribute the materials in a manner which is disruptive, and may not pressure or force individuals to accept materials.

Students who distribute materials are responsible for removing all discarded and leftover copies from the facilities prior to leaving the premises after distribution.

Students who violate this policy shall be subject to disciplinary action in accordance with the district's policies on student behavior.

Information Tables at Open House Events

The superintendent may, but is not required, to designate an open house event up to one (1) time per semester to allow Authorized Groups and Others to set up information tables and meet with parents and students. Authorized Groups may also have additional opportunities and preferential locations for providing materials and information to parents and students. Others will not be excluded solely because of political, religious, or philosophical beliefs.

Adopted: August 20, 2019

MEDICAL MARIJUANA, HEMP & CANNABIDIOL (CBD)

Regardless of a student, employee, parent or any individual's status as a medical marijuana license holder, marijuana is not allowed on the premises of the district or in any school vehicle or in any personal vehicle transporting a student under any circumstances. While the use of medical marijuana in conjunction with the possession of a medical marijuana license is legal in the State of Oklahoma, marijuana is a prohibited controlled substance under federal law regardless of the use being for medical purposes. Accordingly, possession of marijuana by a student, employee, parent or any individual, notwithstanding the possession of a medical marijuana license, is strictly prohibited while on the premises of the district and in school vehicles; going to and from and attending district sponsored functions, events, and athletic activities, including those district sponsored functions, events and/or athletic activities which occur in a location other than the premises of the district; utilizing district equipment or transportation; and in any other instance in connection with the district where the district reasonably deems the possession of marijuana to be illegal.

In the event that a student, employee, parent or any individual is found to possess or to have possessed marijuana in any of the instances stated above, the district will proceed with all actions and consequences that are afforded to the district under any state or federal law, employment contract, district policy, student handbook provision, or any other authority applicable to or adopted by the district.

A. Definitions

The following definitions shall apply:

1. **Marijuana:** all parts of the plant *Cannabis sativa* L., whether growing or not; the seeds thereof; the resin extracted from any part of such plant; and every compound, manufacture, salt, derivative, mixture or preparation of such plant, its seeds or resin (except cannabidiol made from hemp which meets the definition of "Hemp Cannabidiol" as defined below). The term "marijuana" shall not include any federal Food and Drug Administration-approved cannabidiol medication.
2. **Hemp Cannabidiol ("Hemp CBD"):** a nonpsychoactive cannabinoid made from hemp that has a tetrahydrocannabinol concentration of not more than three-tenths of one percent (0.3%).
3. **Hemp:** the plant *Cannabis sativa* L. and any part of that plant, including the seeds thereof and all derivatives, extracts, cannabinoids, isomers, acids, salts, and salts of isomers, whether growing or not, with a delta-9 tetrahydrocannabinol concentration of not more than 0.3% on a dry weight basis.

4. THC: tetrahydrocannabinol.

The terms “marijuana” and “possession of marijuana” will be interpreted by the district in accordance with state and federal law. Any conflict between state and federal law as to the definition or treatment of “marijuana,” “possession of marijuana,” “hemp” or “cannabidiol” will be interpreted in accordance with the circumstances and proper legal authority.

B. Nondiscrimination

There will be no discrimination in the district because of an individual’s status as a medical marijuana license holder.

C. Hemp and Hemp Cannabidiol (Hemp CBD)

1. Regulation: Hemp CBD is regulated differently than marijuana under both state and federal law. Possession and administration of Hemp CBD shall be treated differently based on the concentration of THC in the Hemp CBD. In no instance will this section be construed to apply to a substance that (1) is not made from hemp or (2) contains more than 0.3% THC.

a. Hemp CBD Containing 0.0% THC

(1) Employees and other Non-Student Individuals: Employees and individuals who are not students of the district may possess and self-administer Hemp CBD containing 0.0% THC on the premises of the district. However, employees or non-student individuals must be able to certify, upon request, that the Hemp CBD contains 0.0% THC at the time of possession and/or self-administration via a reliable product label. Employees and non-student individuals are not permitted to self-administer Hemp CBD in the presence of students.

(2) Students: A parent or legal guardian of a student may administer Hemp CBD containing 0.0% THC to the student in accordance with this policy. Hemp CBD containing 0.0% THC may only be administered to a student in an area designated by the district’s personnel. The parent, legal guardian must certify that the Hemp CBD contains 0.0% THC via a declaration given under penalty of perjury prior to administering such Hemp CBD to the student in the district’s designated administration area. Such declaration shall be effective for the semester in which it is given. A new declaration must be provided by a parent or legal guardian each semester. After the parent or legal guardian of the student has administered the Hemp CBD containing 0.0% THC to the student, the parent or legal guardian must remove the Hemp CBD from the district’s premises.

b. Hemp CBD Containing 0.3% THC

(1) Employees and other Non-Student Individuals: Employees and individuals who are not students of the district may possess and self-administer Hemp CBD containing up to a maximum of three-tenths of one percent (0.3%) THC on the premises of the district provided they meet one of the following:

- (a) The employee or individual who is not a student is a medical marijuana license holder; or
- (b) The employee or individual who is not a student has a written certification from a physician licensed in Oklahoma that the employee or individual that is not a student has been diagnosed by a licensed physician as having one of the following:
 - i. Lennox-Gastaut Syndrome;
 - ii. Dravet Syndrome, also known as Sever Myoclonic Epilepsy of Infancy;
 - iii. Any other severe form of epilepsy that is not adequately treated by traditional medical therapies;
 - iv. Spasticity due to multiple sclerosis or due to paraplegia;
 - v. Intractable nausea and vomiting; or
 - vi. Appetite stimulation with chronic wasting diseases.

Employees or non-student individuals must be able to verify, upon request, (1) that they meet an exception listed above, and (2) that the Hemp CBD contains no more than 0.3% THC at the time of possession and/or self-administration, via a reliable product label or a physician's certification. Employees and non-student individuals are not permitted to self-administer Hemp CBD in the presence of students.

- (2) **Students:** Students of the district may not possess and/or self-administer Hemp CBD containing THC in an amount no greater than 0.3%. However, the parent, legal guardian or caregiver (as defined in 63 O.S. § 420A) of the student may administer Hemp CBD containing THC in an amount no greater than 0.3% on district premises in accordance with this policy if the student meets one of the following exceptions:

- (a) The student is a medical marijuana license holder; or
- (b) The parent, legal guardian, or caregiver of the student has a written certification from a physician licensed in Oklahoma that the student has been diagnosed by a licensed physician as having one of the following:
 - i. Lennox-Gastaut Syndrome;
 - ii. Dravet Syndrome, also known as Sever Myoclonic Epilepsy of Infancy;
 - iii. Any other severe form of epilepsy that is not adequately treated by traditional medical therapies;
 - iv. Spasticity due to multiple sclerosis or due to paraplegia;
 - v. Intractable nausea and vomiting; or
 - vi. Appetite stimulation with chronic wasting diseases.

The physician's written certification must also provide that the Hemp CBD being administered to the student has a THC level of not more than 0.3% and the Hemp CBD was delivered to the student, parent, or legal guardian in a liquid form.

The parent, legal guardian, or caregiver may administer Hemp CBD containing THC in an amount no greater than 0.3% to the student in an area designated by the district's personnel. The parent, legal guardian, or caregiver must certify that the Hemp CBD contains THC in an amount no greater than 0.3% via a declaration given under penalty of perjury prior to administering such Hemp CBD to the student in the district's designated administration area. Such declaration shall be effective for the semester in which it is given. A new declaration must be provided by the parent, legal guardian, or caregiver each semester. After the parent, legal guardian or caregiver of the student has administered the Hemp CBD to the student, the parent, legal guardian or caregiver must remove the Hemp CBD from the district's premises.

2. Administration by School Personnel and Storage: In no instance will a district employee administer Hemp CBD to a student, unless they are the parent, legal guardian, or caretaker for that student. The district will not maintain or store a student's Hemp CBD for any length of time.
3. Violations: In the event that a student, employee, parent or any individual is found to have violated the district's policy regarding Hemp CBD possession and/or self-administration, the district will proceed with all actions and consequences that are afforded to the district under any state or federal law, employment contract, district policy, student handbook provision, or any other authority applicable to or adopted by the district.

D. Overlap with Other District Policies

The district recognizes that the legal aspects and consequences of medical marijuana, cannabidiol, and hemp are new and possibly subject to change. These legal aspects and consequences of medical marijuana, cannabidiol, and hemp effect many areas of the district's current policies regarding employees, students, parents and individuals on district premises or attending district events. The district will continue to enforce its current adopted policies. As the need arises with changes in state and/or federal law, the district will consider and/or examine district policies in order to assess whether revisions, if any, may be needed to a district policy in order to comply with state and federal law.

E. Employees

Employees of the district are expected to comply with state and federal law at all times as a term of their continued employment with the district. In that regard, employees are hereby notified that any person who uses or is addicted to marijuana, regardless of whether his or her state has passed legislation authorizing marijuana use for medicinal or recreational purposes, is an unlawful user of or addicted to a controlled substance and is prohibited by federal law from possessing firearms or ammunition. See 18 U.S.C. § 922(g)(3); see also Bureau of Alcohol, Tobacco, Firearms and Explosives ("ATF") open letter to all federal firearms licensees (<https://www.atf.gov/file/60211/download>). Employees are expected to adhere to any and all open letters, formal opinions, directives, or any other instruction provided by federal or state agencies regarding state and/or federal law.

F. Prescription Medications

This policy does not apply to any federal Food and Drug Administration-approved cannabidiol medication. Such medication may not be possessed or self-administered by students. These medications must be stored in district offices and may be administered by the school nurse or other designated district personnel in accordance with the district's policy on Administration of Medicine.

Adopted: August 20, 2019

GENERAL FUND CARRYOVER

This policy is adopted in accordance with the provisions of applicable law by the Board of Education of the Muskogee School District (the "District"). This policy sets forth the carryover policy for the public funds of the District in its general fund. This policy is designed to ensure prudent management of public funds, the availability of funds when needed, and to ensure the District stays on a firm financial foundation.

General Fund Carryover Purpose:

In order for the District to stay on a firm financial foundation, it must have a sufficient carryover in its general fund on June 30 of each fiscal year. This carryover is used to pay District obligations until ad valorem tax revenue is received, avoid the issuance of nonpayable warrants and to weather cuts in revenue of the District. A healthy carryover is extremely important in times of revenue shortfalls or reductions in revenue of the State of Oklahoma.

General Fund Carryover Policy:

Currently, under OKLA. STAT. tit. 70, Section 18-2001 (G), the District is limited to a carryover of 14% in its general fund on June 30 of each fiscal year. The law provides that the District will have its State Aid reduced by an amount equal to the amount of carryover in the general fund of the District as of June 30 of the preceding fiscal year that is in excess of the 14% for the 2 consecutive years. **Therefore, it is the policy of the District that its carryover in the general fund on June 30 of each fiscal year not exceed 14%, if possible.** If it actually is, or is projected, that the District's carryover for June 30 in any fiscal year will exceed 14%, then the District will take the appropriate steps to try to ensure that the carryover does not exceed 14%. Such steps may include, but are not limited to: (1) purchasing of additional supplies; (2) adding additional programs, curriculum and staff; and (3) shifting appropriate costs from the building fund to the general fund.

The District believes it is also important to set a minimum amount for its carryover in the general fund on June 30 of each fiscal year. **Accordingly, it is the policy of the District that its carryover in the general fund on June 30 of each fiscal year not be below 5%, if possible.** If it actually is, or is projected, that the District's carryover for June 30 in any fiscal year will be below 5%, then the District will try to take appropriate steps to ensure that the carryover does not go below 5%. Such steps may include, but are not limited to: (1) reducing/cutting programs, curriculum and staff; (2) shifting appropriate costs from the general fund to the building fund; and (3) cutting other expenses of the District, as allowed by law.

FUND BALANCE POLICY IN ACCORDANCE WITH GASB STATEMENT NO. 54

It is the policy of the District to adopt Governmental Accounting Standards Board Statement No. 54, which defines fund balances of the governmental funds are to be presented in the financial statements. The governmental fund financial statements present fund balances based on classifications that comprise a hierarchy that is based primarily on the extent to which the District is bound to honor constraints on the specific purposes for which amounts in the respective governmental funds can be spent. The classifications used in the governmental fund financial statements are as follows:

Non-Spendable Fund Balance - Amounts that are not in a spendable form such as prepaid expenses, and consumable inventories are classified as Non-spendable.

Restricted Fund Balance - Amounts designated for specific purposes by their providers such as bondholders, grantors, or imposed by law through constitutional provisions or enabling legislation.

The District's Building Fund balance is restricted by statute to certain capital related costs. The District's Debt Service Fund balance is restricted by law to purposes of retiring the District's long-term debt. The District's Bond Fund balances are restricted by the District voters for specific construction programs. The District's Child Nutrition Fund balance is restricted by law to the operations of the District's Child Nutrition programs.

Committed Fund Balance - Amounts designated for specific purposes by the District's highest level of decision-making authority (Board of Education) and cannot be used for any other purposes unless the same highest level (Board of Education) takes action to remove or change the designation. The District' commits a portion of the General Fund balance in accordance with the Board of Education's minimum fund balance policy. The District commits a portion of the accrual basis fund balance to honor the commitments made by the District for encumbrances (purchase orders) for which goods or services have not yet been received. The fund balance committed to encumbrances will be equivalent to the purchase orders rolled forward from one fiscal year to the next fiscal year.

Assigned Fund Balance - Amounts the District intends to use for specific purposes; intent can be expressed by the governing body or by an official to which the governing body delegates authority. The District assigns funds for education that to be used for instruction, support services, and other operating expenditures. The Superintendent and Chief Financial Officer will determine the amount of assigned fund balance at the end of each fiscal year.

Unassigned Fund Balance - This classification includes the residual fund balance of the General Fund and may be used to finance operating expenditures.

<p align="center">MUSKOGEE PUBLIC SCHOOLS BOARD OF EDUCATION POLICY</p>	<p align="center"><i>Business and Auxiliary Services</i> 103480</p> <p align="center">Adopted: August 20, 2019</p>
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CAPITAL ASSET POLICY

The District maintains inventory records of all capital assets purchased, donated, gifted, or produced. A capital asset is defined as individual items with a purchase price equal to or greater than \$2,500.00 and a useful life greater than one year. Capital assets include land, improvements to land, buildings, building improvements, vehicles, machinery, and equipment. The provisions of this policy are applicable regardless of the purchasing funding source (i.e. General Fund, Building Fund, Bond Fund, or Activity Fund). The cost of capital assets should include any capitalized interest and any ancillary charges necessary to place the asset into service. Ancillary charges could include freight, site preparation, and professional fees. Donated or gifted capital assets will be recorded at their fair market value at the time of donation.

The District utilizes OCAS object codes of 653, and all codes in the 700's to capture purchases that meet the criteria for capitalization. Each of these purchases is tagged with a District inventory tag, when received by District warehouse personnel. Additionally, capital assets purchased through a Federal program will have an additional federal program label with the pertinent information, as required by the rules and regulations of the applicable program. The District's capital asset records will be updated at least annually for the preparation of the District's annual financial statements.

Useful Lives:

Capital assets will be depreciated over the following useful lives using the straight line depreciation method:

Asset Class	Years
Buildings	50-100
Improvements	25-50
Equipment	5-25
Vehicles	4-20

Surplus Inventory Items:

Items that are no longer used or needed are considered surplus property. All surplus property will be approved as such by the Board of Education. After the Board has approved them as surplus they will be disposed of and the item(s) will be removed from the District's capital asset records.

Technology Equipment Under \$2,500.00:

The Technology Department tracks all technology equipment including chromebooks, laptops, desktops, ipads, etc. These items are tagged with an inventory sticker, and are tracked by an inventory system maintained by the Technology Department. An annual inventory will be conducted on these items. Any equipment that is no longer needed is to

be declared surplus and removed from the respective inventory system. The Technology Department also tracks items that are over \$2,500.00, which are also tracked and depreciated through the District's accounting software.

SELECTION OF A CONSTRUCTION MANAGER

Pursuant to 61 O.S. § 62, the Board of Education authorizes the Superintendent or his or her designee to develop and maintain procedures for the selection of a construction manager for each project for which the District determines that the employment of a construction managers is permitted and desirable. This procedure shall, at a minimum:

1. Extend consideration only to construction mangers recognized as qualified by the Department of Real Estate Services of the Office of Management and Enterprise Services;
2. Evaluate the candidates' professional qualifications, including but not limited to, licensing, registration, certifications, technical abilities and past experience relevant to the contemplated project; and
3. Select a construction manager based on professional qualifications and technical experience.

Upon selection of a construction manager, the District shall negotiate a contract with the highest qualified construction manager, provided that a fee can be negotiated that is fair and reasonable to both parties. In the event a reasonable fee cannot be negotiated with the selected construction manager, the District may negotiate with other construction managers in order of their qualifications.

Reference: 61 O.S. § 62

MUSKOGEE PUBLIC SCHOOLS
BOARD OF EDUCATION POLICY

Business and Auxiliary Services
103500

Adopted: May 19, 2020

POST-ISSUANCE TAX COMPLIANCE PROCEDURES FOR TAX-EXEMPT BONDS

The purpose of these Post-Issuance Tax Compliance Procedures is to establish policies and procedures in connection with tax-exempt obligations (the “Bonds”) issued by Independent School District Number 20 of Muskogee County, State of Oklahoma (the “Issuer”), so as to maximize the likelihood that all applicable post-issuance requirements of the Internal Revenue Code of 1986, as amended (the “Code”) and applicable Treasury Regulations (the “Regulations”) needed to preserve the tax-exempt status of the Bonds are met. The Issuer reserves the right to use its discretion as necessary and appropriate to make exceptions or create additional provisions as circumstances warrant. The Issuer also reserves the right to change these policies and procedures from time to time.

General

Proceeds of the Issuer’s Bonds are used to finance certain facilities and equipment. Federal tax law limitations apply to the Issuer’s Bonds. These limitations apply throughout the life of the outstanding Bonds. Some of these “over the life” limitations relate to the investment of proceeds of the Bonds, and others relate to the use and expenditure of the proceeds of the Bonds. A failure to meet these “over the life” limitations at any time during the life of the Bonds could result in the retroactive and prospective loss of the tax-exempt status of the Bonds or the imposition of additional taxes or assessments on the Issuer.

The Board of Education of the Issuer has the overall, final responsibility for monitoring whether the Issuer is in compliance with post-issuance federal tax requirements for the Issuer’s Bonds. However, the Board of Education assigns to the Chief Financial Officer (the “Compliance Officer”) the primary operating responsibility to monitor the Issuer’s compliance with post-issuance federal tax requirements for the Issuer’s Bonds.

The Compliance Officer shall be aware of options for voluntary corrections for failure to comply with post-issuance compliance requirements (such as remedial actions under Section 1.141-12 of the Regulations and the United States Treasury’s Tax-Exempt Bonds Voluntary Closing Agreement Program) and take such corrective action when necessary and appropriate.

The Compliance Officer shall review post-issuance compliance procedures and systems on a periodic basis, but not less than annually.

Post-Issuance Compliance Requirements

External Advisors / Documentation

The Issuer shall consult with bond counsel and other legal counsel and advisors, as needed, throughout the Bond issuance process to identify requirements and to establish procedures necessary or appropriate so that the Bonds will continue to qualify for tax-exempt status. The Issuer also shall consult with bond counsel and other legal counsel and advisors, as needed, following issuance of the Bonds to ensure that all applicable post-issuance requirements in fact are met. This shall include, without limitation, consultation in connection with any potential changes in use of Bond-financed or refinanced assets.

The Issuer shall be responsible to determine (or obtain expert advice to determine) whether arbitrage rebate calculations have to be made for the Bond issue. If it is determined that such calculations are or are likely to be required, the Issuer shall engage expert advisors (each a "Rebate Service Provider") to assist in the calculation of arbitrage rebate payable in respect of the investment of Bond proceeds, or else shall ensure that it has adequate financial, accounting and legal resources of its own to make such calculations. The Issuer shall make any rebate payments required on a timely basis.

The investment of Bond proceeds shall be managed by the Issuer in accordance with applicable statutory provisions. The Issuer shall maintain adequate records regarding the investments and transactions involving Bond proceeds.

Arbitrage Yield Restriction and Rebate Requirements

The Compliance Officer shall be responsible for overseeing compliance with arbitrage yield restriction and rebate requirements under federal tax regulations, as follows:

- 1) Monitor compliance with the applicable "temporary period" (as defined in the Code and Regulations) exceptions for the expenditure of Bond proceeds, and provide for yield restriction on investments including "yield reduction payments" (as defined in the Code and Regulations) where applicable. Generally, there is a 3-year temporary period for capital projects.
- 2) Ensure that investments acquired with Bond proceeds are purchased at fair market value. In determining whether an investment is purchased at fair market value, any applicable safe harbor under the Code and Regulations may be used.
- 3) In the case of any issue of Bonds for an "advanced refunding" (as defined in the Code and Regulations), coordinate with the Issuer's financial advisor and any escrow agent to arrange for the purchase of the refunding escrow securities, arrange for the computation of the yield on such escrow securities by an outside verification agent, and monitor compliance with applicable yield restrictions.
- 4) If at the time of Bond issuance, based on reasonable expectations set forth in the tax certificate/agreement executed at the time of Bond issuance (the "Tax Certificate"), it appears likely that the Bond issue will qualify for an exemption from the rebate requirement, the Issuer may defer taking any of the actions set forth in subsection (5). Not later than the time of completion of construction or acquisition of the project (or, in the case of a refunding, the redemption of the refunded bonds), and depletion of all funds from the borrowed money

fund, the Issuer shall make a determination if expenditure of the Bond proceeds qualified for exemption from the rebate requirements based on the “small issuer” exception or spending within 6 months, 18 months or 24 months after issuance. As of the adoption of these procedures, the Issue will qualify for the “small issuer” or “spending exceptions” to the general rebate requirements under the following circumstances:

Exception	Circumstances
Small Issuer	An issue (other than a refunding issue) qualifies for the small issuer exception only if the issuer reasonably expects as of the issue date to issue, or in fact issues, \$5M or less in tax-exempt governmental bonds during that calendar year. The aggregation rules of section 148(f)(4)(D) of the Code should be considered when determining whether this exception applies. The \$5M limit shall be increased when financing public school capital expenditures by the lesser of \$10M or so much of the aggregate face amount of the bonds attributable to financing the construction.
6-Month	Section 1.148-7(c) of the Treasury regulations provides an exception to rebate if the gross proceeds of the bond issue are allocated to expenditures for governmental or qualified purposes that are incurred within 6 months after the date of issuance.
18-Month	Section 1.148-7(d) of the Treasury regulations provides an exception to rebate if the gross proceeds of the bond issue are allocated to expenditures for governmental or qualified purposes which are incurred within the following schedule: 1) 15% within 6 months after the date of issuance; 2) 60% within 12 months after the date of issuance; and 3) 100% within 18 months after the date of issuance.
2-Year	Section 1.148-7(e) of the Treasury regulations provides that an exception to rebate is available with respect to construction issues financing property to be owned by a governmental entity or 501(c)(3) organization when certain available construction proceeds are allocated to construction expenditures within the following schedule: 1) 10% within 6 months after the date of issuance; 2) 45% within 12 months after the date of issuance; 3) 75% within 18 months after the date of issuance; and 4) 100% within 24 months after the date of issuance.

If a rebate exemption is determined to be applicable, the Issuer shall prepare and keep in the permanent records of the Bond issue a memorandum evidencing this conclusion together with records of expenditure to support such conclusion. If the transaction does not qualify for rebate exemption, the Issuer shall initiate the steps set forth in (5) below.

5) If at the time of Bond issuance it appears likely that arbitrage rebate calculations will be required, or upon determination that calculations are required pursuant to (4) above, the Issuer shall:

- engage the services of a Rebate Service Provider and, prior to each rebate

calculation date, deliver periodic statements concerning the investment of Bond proceeds to the Rebate Service Provider;

- provide to the Rebate Service Provider additional documents and information reasonably requested by the Rebate Service Provider;
- monitor efforts of the Rebate Service Provider;
- assure payment of required rebate amounts, if any, no later than 60 days after each 5-year anniversary of the issue date of the Bonds, and no later than 60 days after the last Bond of each issue is redeemed;
- during the construction period of each capital project financed in whole or in part by Bonds, monitor the investment and expenditure of Bond proceeds and consult with the Rebate Service Provider to determine compliance with any applicable exceptions from the arbitrage rebate requirements during each 6-month spending period up to 6 months, 18 months or 24 months, as applicable, following the issue date of the Bonds; and
- retain copies of all arbitrage reports as described below under “Record Keeping Requirements.”
- in lieu of engaging an outside Rebate Service Provider, the Issuer may make a determination that it has sufficient capabilities using its own personnel, supported by its regular accounting and legal advisers, to be able to make the required rebate calculations. Such determination shall be evidenced in writing with specific reference to the personnel and advisers to carry out the calculations, and such written determination shall be maintained in the records of the bond transaction.

Use of Bond Proceeds and Bond-Financed or Refinanced Assets:

The Compliance Officer shall be responsible for:

- monitoring the use of Bond proceeds (including investment earnings and including reimbursement of expenditures made before bond issuance) and the use of Bond-financed or refinanced assets (e.g., facilities, furnishings or equipment) throughout the term of the Bonds to ensure compliance with covenants and restrictions set forth in the Tax Certificate relating to the Bonds;
- maintaining records identifying the assets or portion of assets that are financed or refinanced with proceeds of each issue of Bonds (including investment earnings and including reimbursement of expenditures made before bond issuance), including, if necessary a final reallocation of Bond proceeds within 18 months after each project financed by the Bonds is placed in service in accordance with Section 1.148-6(d) of the Regulations;
- consulting with bond counsel and other legal counsel and advisers in the review of any change in use of Bond-financed or refinanced assets to ensure compliance with all covenants and restrictions set forth in the Tax Certificate relating to the Bonds;
- conferring at least annually with personnel responsible for Bond-financed or

refinanced assets to identify and discuss any existing or planned use of Bond-financed or refinanced assets, to ensure that those uses are consistent with all covenants and restrictions set forth in the Tax Certificate relating to the Bonds;

- to the extent that the Issuer discovers that any applicable tax restrictions regarding use of Bond proceeds and Bond-financed or refinanced assets will or may be violated, consulting promptly with bond counsel and other legal counsel and advisers to determine a course of action to remediate all nonqualified bonds, if such counsel advises that a remedial action is necessary;

All relevant records and contracts shall be maintained as described below.

Information Reporting

After delivery of the bond proceeds, the Financial Advisor shall provide the Issuer with the completed IRS Form 8038-G, Information Return for Tax-Exempt Governmental Obligations, or 8038-GC, Information Return for Small Tax-Exempt Governmental Bond Issues, Leases, and Installment Sales, as applicable. The Compliance Officer shall sign and date the form and then mail it certified mail, return receipt requested, to the Internal Revenue Service. As of the date of the adoption of these procedures, the form is required to be filed by the 15th day of the second calendar month following the quarter in which the bonds were issued. The Issuer shall retain a copy of the executed form and the return mail receipt with the other documents associated with the tax exempt bonds.

Qualified Tax-Exempt Obligations

If the Issuer issues “qualified tax-exempt obligations” in any year, the Compliance Officer shall monitor all tax-exempt financings (including lease purchase arrangements and other similar financing arrangements) to assure that the “small issuer” limit (currently, \$10,000,000) is not exceeded.

Record Keeping Requirement

The Compliance Officer shall be responsible for maintaining the following documents for the term of each issue of Bonds (including refunding Bonds, if any) plus at least six years:

- a copy of the Bond closing transcript(s) and other relevant documentation delivered to the Issuer at or in connection with closing of the issue of Bonds;
- a copy of all material documents relating to capital expenditures financed or refinanced by Bond proceeds, including (without limitation) construction contracts, purchase orders, invoices, requisitions and payment records, as well as documents relating to costs reimbursed with Bond proceeds and records identifying the assets or portion of assets that are financed or refinanced with Bond proceeds, including a final allocation of Bond proceeds; and
- a copy of all records of investments, investment agreements, arbitrage reports and underlying documents, in connection with any investment agreements, and copies of all bidding documents, if any.

While document retention is typically accomplished through the maintenance of hard copies, records may be kept in electronic format so long as applicable requirements, such

as Revenue Procedure 97-22, are satisfied. IRS bond agents have been instructed to request documents and information in electronic format. IRM 4.81.5.7.2.4 (11-01-09). For this reason it is advisable to retain records relating to the Issuer's bonds in electronic format whenever practical.

Continuing Disclosure

Under the provisions of SEC Rule 15c2-12 (the "Rule"), underwriters are required to obtain an agreement for ongoing disclosure in connection with the public offering of securities in a principal amount in excess of \$1,000,000. Unless the Issuer is exempt from compliance with the Rule as a result of certain permitted exemptions, the Transcript for each issue of Bonds will include an undertaking by the Issuer to comply with the Rule. The Compliance Officer will monitor compliance by the Issuer with its undertakings, which may include the requirement for an annual filing of operating and financial information and will include a requirement to file notices of listed "material events." As of the adoption of these procedures, the Issuer is required to give notice of the occurrence of any of the following events:

1. Principal and interest payment delinquencies;
2. Non-payment related defaults, if Material;
3. Unscheduled draws on debt service reserves reflecting financial difficulties;
4. Unscheduled draws on credit enhancements reflecting financial difficulties;
5. Substitution of credit or liquidity providers, or their failure to perform;
6. Adverse tax opinions, the issuance by the Internal Revenue Service of proposed or final determinations of taxability, Notices of Proposed Issue (IRS Form 5701-TEB), or other material notices of determinations with respect to the tax status of the Bonds, or other material events affecting the tax status of the Bonds;
7. Modification to rights of Bondholders, if Material;
8. Bond calls, if Material, and tender offers;
9. Defeasances;
10. Release, substitution, or sale of property securing repayment of the Bonds, if Material;
11. Rating changes;
12. Bankruptcy, insolvency, receivership or similar event of the Issuer;
13. The consummation of a merger, consolidation, or acquisition involving the Issuer, or the sale of all or substantially all of the assets of the Issuer, other than in the ordinary course of business, the entry into a definitive agreement to undertake such an action or the termination of a definitive agreement relating to any such actions, other than pursuant to its terms, if Material;
14. Appointment of a successor or additional Trustee/Paying Agent or the change of name of a Trustee/Paying Agent, if Material;
15. Incurrence of a financial obligation of the obligated person, if material, or agreement to covenants, events of default, remedies, priority rights, or other similar terms of a financial obligation of the obligated person, any of which affect security holders, if material; and
16. Default, event of acceleration, termination event, modification of terms, or other similar events under the terms of a financial obligation of the obligated person, any of which reflect financial difficulties.

Education Policy

It is the policy of the Issuer that the Compliance Officer and his or her staff, as well as the principal operating officials of those departments of the Issuer for which property is financed with Bond proceeds should be provided with education and training on federal tax

requirements applicable to tax-exempt bonds. The Issuer recognizes that such education and training is vital as a means of helping to ensure that the Issuer remains in compliance with those federal tax requirements in respect of its Bonds. The Issuer will therefore enable and encourage those personnel to attend and participate in educational and training programs offered by professional trade associations and other entities with regard to the federal tax requirements applicable to tax-exempt bonds.

Sample "Small Issuer Exception" Memorandum

RE: _____ General Obligation _____ Bonds of _____
of Independent School District Number 20 of Muskogee County, Oklahoma, dated
_____, 1, _____.

Independent School District Number 20 of Muskogee County, Oklahoma (the "Issuer"), believes the referenced bond issue qualifies for the "small issuer exception" from the rebate requirement because, as of the issue date, the aggregate face amount of all tax-exempt bonds (including the Obligation and notes or other obligations) issued by the Issuer (and all subordinate entities thereof) during calendar year _____ is not reasonably expected to exceed \$5,000,000 plus the lesser of \$10,000,000 or so much of the aggregate face amount of the bonds as are attributable to financing the construction of public school facilities (not less than _____).

Signature

Date

Printed Name/Title

**SERVICE OF LEGAL PAPERS ON SCHOOL GROUNDS
DURING SCHOOL HOURS**

The Board of Education recognizes the importance the judicial system plays in the United States, and that its employees, like other citizens, have a role to play in the administration of justice. The Board also recognizes that service of legal papers on its employees during the school day can (a) materially disrupt the educational process for both students and staff, (b) pose security risks, and (c) adversely affect the conduct of business on District property. Moreover, the delivery of legal documents to a school site or school employee may trigger important timelines and other legal obligations, which if not dealt with in a timely manner, can have serious consequences for the District or the person to whom the document should ultimately be delivered.

Time Limitation and Required Authorizations

To minimize these risks and to create the best possible educational environment, the District will not make employees available for service of legal papers on the grounds of any District property between the workday hours of 7:30 a.m. and 4:30 p.m. No person, not authorized to accept service for another individual or the District, may accept service on behalf of the District, Board of Education and/or the Superintendent, or another staff member. In instances in which a staff member has requested service of legal papers at work, the staff member must notify the building principal in writing of the authorization for service.

Service of Legal Papers

Persons seeking to serve legal papers, including but not limited to subpoenas, on employees during the prohibited time will, upon request, be advised of this policy and provided a copy or electronic address for the policy. Should an individual seeking to serve legal papers refuse to leave District property after being informed of this policy, or an individual repeatedly violates this policy, the District reserves the right to restrict the individual's access to District property in accordance with OKLA. STAT. tit. 21, §§ 1375-1376, OKLA. STAT. tit. 70 § 24-131.

District employees that are aware of school or student-related proceedings at which they may be called to testify are to notify the administration as soon as possible and coordinate with building principals or other administrators to avoid disruption if they are subpoenaed.

Testimony in Civil Matters

In the event employees are contacted directly by an attorney or any other individual regarding testimony concerning a district or district student matter, they should direct that person to their building principal or other member of the administration for further coordination. This duty to inform and contact the building principal does not apply in

instances in which the contacts with the employee concern legal matters personal to the employee, his/her employment, or the employee's child.

Law Enforcement

Law enforcement personnel seeking to serve legal papers mandated by a court of competent jurisdiction should contact the building principal in advance to arrange an appointment. At that time, the building principal may elect to make the employee available to receive service of process.

Witness Fee Due District

Pursuant to OKLA. STAT. tit. 28, § 84.1(B), the District shall be paid a witness fee equal to the amount of a substitute teacher cost, not to exceed \$100 any time a District employee is subpoenaed to appear as a witness in a civil court proceeding. Such payment shall be made well in advance of any District employee's attendance at a proceeding.

FERPA/Privacy Compliance

Administrators who become aware of the need for a District employee to testify in a civil proceeding should evaluate the nature of prospective testimony in order to ensure that such testimony will not violate FERPA mandates and/or Oklahoma confidentiality laws. If there are any concerns that an employee's testimony could violate privacy laws (including FERPA), the District's legal counsel should be notified so that appropriate notice can be issued to affected parties.

CRIMINAL HISTORY AFFIDAVITS FOR CONTRACTORS

The district seeks to ensure that individuals who will be present on district property do not have prior criminal histories indicating that their presence poses a threat to the safety of students and employees. Therefore, and in accordance with applicable law, individuals and entities that enter into certain contracts with the district involving the performance of work/services on district property shall be required to execute criminal history affidavits as set forth below.

Definitions

1. **Contractor** - A person or business having a contract with the district under which the contractor and/or employees of the contractor will (1) perform services on the property of the district, and/or (2) perform work on a full-time or part-time basis that would otherwise be performed by district employees.

Criminal History Affidavits Required for Contractors

Prior to board approval of any contract between the district and a contractor, an authorized representative of the contractor shall be required to execute and deliver to the district an affidavit declaring under penalty of perjury that (1) no individual working on district premises under authority of the contractor is currently registered or required to register under the provisions of the Oklahoma Sex Offenders Registration Act or the Mary Rippey Violent Crime Offenders Registration Act, and (2) no individual who will perform work on district premises that would otherwise be performed by district employees under the authority of the contractor has been convicted in the United States of any felony offense unless ten (10) years has elapsed since the date of the criminal conviction or the employee has received a pardon for the criminal offense. The affidavit shall be in the form attached to this policy.

No contractor shall be permitted to perform work/services on district property until the contractor or an authorized representative of the contractor has executed and delivered a criminal history affidavit as required by this policy.

Individuals/business/other entities that do not fall within the definition of a "contractor" set forth above, including, but not limited to, vendors, volunteers, college/professional/military recruiters, architects and/or attorneys, are not required to provide criminal history affidavits.

Requests for Felony Records Searches by Contractors

Contractors whose employees will perform work on a full-time or part-time basis that would otherwise be performed by district employees may submit requests for felony records searches regarding their employees to the State Board of Education (“OSBE”). It shall be the sole responsibility of the contractor to request appropriate felony records searches regarding the contractor’s employees from the OSBE consistent with the requirements of this policy.

Reference: OKLA. STAT. tit. 70, § 6-101.48

