# IOLA INDEPENDENT SCHOOL DISTRICT

## WORKSHOP

**July 15, 2024**

**5:30 P.M.**

## REGULAR BOARD MEETING

**July 15, 2024**

**6:30 P.M.**

IOLA INDEPENDENT SCHOOL DISTRICT
BOARD WORKSHOP

July 15, 2024

Monday: 5:30 p.m. **IOLA ISD BOARD ROOM**

1. Call to order
2. Board Operating Procedures Handbook and future board request
3. Adjourn

Jeff Dyer
Superintendent

This notice was posted and filed in compliance with the Open Meetings Law on July 12, 2024.

IOLA INDEPENDENT SCHOOL DISTRICT
NOTICE OF SCHOOL BOARD MEETING

July 15, 2024

MONDAY: 6:30 P.M. IOLA ISD BOARD ROOM

AGENDA

The subjects to be discussed or considered, or upon which any formal action may be taken, are as follows: (Items do not have to be taken in the same order as shown on this meeting notice.)

1. Call to order
2. Invocation
3. Recognition of visitors: Public Forum
4. Consideration of consent agenda
   a. minutes of previous meeting
   b. monthly disbursements
   c. tax report
5. Campus and administrative report
   a. superintendent report
6. Consideration of approval of the local investment policy
7. Consideration of adopting the Board Operating Procedure Handbook
8. Consideration of the TASB Policy Update 123 first read
9. Consideration of approving Right-of-Way easement to the City of Iola for the purpose of Wastewater Treatment Plant.
10. Personnel
    a. employment
    b. resignation
11. Closed Session: Texas Government Code Sections 551.071 (Attorney Consultation), 551.074 (Personnel Matters), 551.082 (Student Discipline Matters), 551.072 (Purchase of Real Property) 551.076 (Student Safety) 551.087 (Deliberations regarding Economic Development Negotiations)
12. Adjourn

This notice was posted and filed in compliance with the Open Meetings Law on July 12, 2024 at 3:00 PM

Jeff Dyer, Superintendent

IOLA INDEPENDENT SCHOOL DISTRICT
NOTICE OF BOARD MEETING

Notice is hereby given that on the 15th of July , 2024, the Board of Trustees of the Iola School District will hold a regular meeting located at Iola ISD Board Room, Iola, Texas 77861. The subjects to be discussed are listed on the agenda which is attached to the made a part of this Notice.

If, during the course of the meeting covered by this Notice, the Board of Trustees should determine that a closed session of the Board of Trustees is required, then such closed or session as authorized by the Texas Open Meeting Act, Texas Government Code Section 551.001 et seq., will be held by the School Board at the date, hour, and place given in this Notice or as soon after the commencement of the meeting covered by this Notice as the School Board may conveniently meet in such closed session concerning any and all purposes permitted by the Act, including, but not limited to the following sections and purposes:
Texas Government Code Section:

| | |
|---|---|
| 551.071 | Private consultation with the board's secretary. |
| 551.072 | Discussing purchase, exchange, lease, or value of real property. |
| 551.073 | Discussing negotiated contracts for prospective gifts or donations. |
| 551.074 | Discussing personnel or to hear complaints against personnel. |
| 551.075 | To confer with employees of the school district to receive information or to ask questions. |
| 551.076 | Considering the deployment, specific occasions for, or implementation of, security personnel or devices. |
| 551.082 | Considering discipline of the public school child, or complaint or charge against personnel. |
| 551.083 | Considering the standards, guidelines, terms, or conditions the board will follow, or will instruct its representatives follow, in consultation with representatives of employees groups. |
| 551.084 | Excluding witnesses from a hearing. |
| 551.087 | Deliberations regarding Economic development negotiations |

Should any final action, final decision, or final vote be required in the opinion of the School Board with regard to any matter considered in such closed session, then the final action, final decision, or final vote shall be either:

(a) in the open meeting covered by the Notice upon the reconvening of the public meeting;
or
(b) at a subsequent public meeting of the School Board upon notice thereof; as the School Board shall determine.

On this 12th of July, 2024original copy was posted on the front window in the School District Administration Building at 3:00 p.m. on said date.

Jeff Dyer, Superintendent
For the Board of Education

**IOLA INDEPENDENT SCHOOL DISTRICT**
**IOLA, TEXAS**

**MEMORANDUM**

**TO:** Iola ISD Board of Trustees

**From:** Jeff Dyer, Superintendent

**DATE:** July 15, 2024

**SUBJECT:** Public Forum (Item 3)

At regular meetings the Board shall allot up to 30 minutes to hear persons who desire to make comments to the Board. Persons who wish to participate in this portion of the meeting shall sign up as they arrive indicating the topics about which they wish to speak.

Public participation is limited to the designated open forum portion of a meeting. At all other times during Board meetings, the audience shall not enter into discussion or debate on matters being considered by the Board. **No presentation shall exceed 5 minutes.**

Specific factual information or recitation of existing policy may be furnished in response to inquiries, but the Board may not deliberate, discuss, or make any decision on any subject not on the agenda.

**BOARD PRESIDENT**: The presiding officer shall determine whether a person who wishes to address the Board has attempted to solve a matter administratively. If not, the person shall be directed to do so before bringing the matter to the board at a subsequent meeting.

Respectfully submitted,

Jeff Dyer
Superintendent

**IOLA INDEPENDENT SCHOOL DISTRICT**
**IOLA, TEXAS**

**MEMORANDUM**

**TO:** Iola ISD Board of Trustees

**From:** Jeff Dyer, Superintendent

**DATE:** July 15, 2024

**SUBJECT:** Consideration of consent agenda (Item 4)

a. minutes of previous meeting
b. monthly disbursements
c. tax report

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It is recommended that the Board of Trustees approve the consent agenda as presented.

Respectfully submitted,

Jeff Dyer
Superintendent

IOLA INDEPENDENT SCHOOL DISTRICT
SCHOOL BOARD MINUTES

June 24, 2024

Monday: 6:30 P.M. IOLA ISD BOARD ROOM

The Board of Trustees of the Iola Independent School District met in regular session on June 24, 2024 in the Board Room, Iola, Texas.

Members Present: Alec Pointer, Tammy Harvey, Mark Cunningham, Jody Evans, Todd Kay and Sierra Betancourt
Member Absent: Jason Gooch

1. Call to order: Alec Pointer @ 6:40 p.m.

2. Invocation: Tammy Harvey

3. Recognition of visitors: Public Forum

4. Consideration of consent agenda
   a. minutes of previous meetings
   b. monthly disbursements
   c. student membership
   d. tax report
   e. SRO
   f. financial report

   A motion was made by Tammy Harvey to approve the consent agenda. Second: Jody Evans
   Vote carried 6-0

5. Campus and administrative report
   a. elementary student and staff activities: No report
   b. high school student and staff activities: Mr. Fowler
   c. superintendent report: Mr. Dyer

6. Consideration of the TEA Waiver for Counselor
   A motion was made by Tammy Harvey to approve the TEA Waiver for Counselor.
   Second: Alec Pointer Vote carried 6-0

7. Update on STAAR Test score: Overview

8. Personnel
   a. employment: none
   b. resignation: Leslie Thomas - A motion was made by Tammy Harvey to accept the resignation of Leslie Thomas. Second: Todd Kay Vote 6-0

9. Closed Session: Texas Government Code Sections 551.071 (Attorney Consultation), 551.074 (Personnel Matters), 551.082 (Student Discipline Matters), 551.072 (Purchase of Real Property) 551.076 (Student Safety) 551.087 (Deliberations regarding Economic Development Negotiations): none

10. Adjourn: A motion was made by Jody Evans to adjourn. Second: Todd Kay
    Vote carried 6-0

_____
Alec Pointer, President

_____
Tammy Harvey, Secretary

**GRIMES COUNTY APPRAISAL DISTRICT**
**TAX COLLECTIONS REPORT**

JURISDICTION: Iola ISD
DATE: June 3, 2024

(1)For Month Ending: May 31, 2024

| | |
|---|---|
| Current Year Taxes | $54,549.69 |
| Current Year P & I | $5,720.78 |
| Current Year Total | $60,270.47 |
| | |
| Prior Years Taxes | $957.21 |
| Prior Years P&I | $443.34 |
| Prior Years Total | $1,400.55 |
| | |
| TOTAL COLLECTIONS | $61,671.02 |

(2) For Year-to-Date: May 31, 2024

| | |
|---|---|
| Current Year Collections (Taxes Only) | $5,110,527.85 |
| Prior Year Collections (Taxes Only) | $26,253.94 |
| Penalty & Interest | $29,081.36 |
| | |
| TOTAL COLLECTIONS | $5,165,863.15 |

Current Year Percent Collected (Taxes Only) 97.55%

I, Mark Boehnke, Tax Assessor/Collector for Iola ISD do hereby solemnly swear that this is a true and correct accounting of all property taxes collected for the Iola ISD for the period indicated.

Mark Boehnke
Chief Appraiser

Sworn and subscribed to before me on this the 3 day of June 2024

Notary Public
State of Texas §
County of Grimes §

MARIA LUISA FLORES
Notary Public, State of Texas
Comm. Expires 09/24/2025
Notary ID 133357963

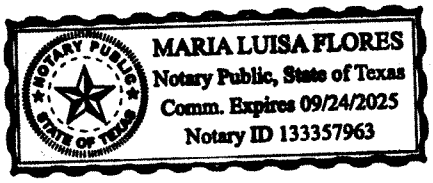
**Tax Collections Report**

I, Mark Boehnke, Chief Appraiser for the Grimes County Appraisal District, do solemnly swear that the attached report is the true and correct accounting for all taxes collected for the Iola ISD during the time period indicated.

Mark Boehnke
Chief Appraiser
Grimes County Appraisal District

Given under my hand and seal of authority on June 3, 2024.

Notary Public in and for the State of Texas



| Check Nbr | Check Date | Payee | PO Nbr | Invoice Nbr | Fnd-Fnc-Obj.So-Org-Prog | Reason | Amount | EFT |
|---|---|---|---|---|---|---|---|---|
| 026910 | 06-05-2024 | UNIVERSAL CHEERLEA | 007319 | 0011277361 | 199-36-6499.00-001-411000 | BALANCE CHEER CAMP COACH | 1,302.00 | N |
| 026911 | 06-06-2024 | ACME ARCHITECTURAL | 201926 | | 199-51-6319.00-999-499000 | Locks / Keys / Stock | 255.78 | N |
| 026912 | 06-06-2024 | ACME GLASS CO, | 201930 | | 199-51-6319.00-999-499000 | Car Window / Daniels | 243.24 | N |
| 026913 | 06-06-2024 | BULK BOOKSTORE | 201903 | | 199-12-6329.00-001-411000 | Smith's Summer Reading | 162.00 | N |
| 026914 | 06-06-2024 | CARTER'S SERVICE STA | 201925 | | 199-51-6319.00-999-499000 | Tractor Tires | 412.00 | N |
| 026915 | 06-06-2024 | CC CREATIONS, INC | 007323 | | 199-13-6399.01-999-411000 | RETIREMENT SUPPLIES | 240.00 | N |
| 026916 | 06-06-2024 | COMPLETE SUPPLY | 201937 | | 199-51-6319.00-999-499000 | Paper Goods/ Janitorial Supply | 1,346.36 | N |
| 026917 | 06-06-2024 | DEL VALLE ISD | 007335 | | 199-36-6499.00-001-491000 | AREA BB PLAYOFF | 618.50 | N |
| 026918 | 06-06-2024 | DIGITAL TWO WAY L.P. | 201929 | | 199-51-6319.00-999-499000 | Radio Speaker Mic | 176.00 | N |
| 026919 | 06-06-2024 | ENTERGY | 007324 | | 199-51-6259.01-999-499000 | ELEM/ FB MAINT | 7,095.51 | N |
| 026920 | 06-06-2024 | GRIMES COUNTY APPR | 007325 | | 199-99-6213.00-703-499000 | THIRD QUARTER PAYMENT | 50,107.25 | N |
| 026921 | 06-06-2024 | INTERQUEST GROUP, IN | 007326 | | 199-52-6219.00-001-499000 | DRUG DOG SERVICES | 320.00 | N |
| 026922 | 06-06-2024 | ITURITY | 007334 | 240922 | 199-11-6399.03-101-411000 | ACCESS TAGS | 684.00 | N |
| 026923 | 06-06-2024 | MARK'S PLUMBING PAR | 201927 | | 199-51-6319.00-999-499000 | Plumbing Parts | 355.32 | N |
| 026924 | 06-06-2024 | PERRY OFFICE | 201932 | | 199-51-6319.00-999-499000 | Paper Goods / Hand soap | 3,993.89 | N |
| 026925 | 06-06-2024 | REPUBLIC SERVICES | 007327 | | 199-51-6259.04-999-499000 | DUMPSTER SERVICE | 1,005.58 | N |
| 026926 | 06-06-2024 | STANDLEY FEED & SEE | 201928 | | 199-51-6319.00-999-499000 | Hose & Nozzle | 89.15 | N |
| 026927 | 06-06-2024 | TEXAS DEPARTMENT O | 007333 | | 199-41-6299.00-701-499000 | HISTORY CHECKS | 3.00 | N |
| 026928 | 06-06-2024 | THORN MUSIC | 007328 | | 199-11-6249.30-001-411000 | INSTRUMENT REPAIRS | 14,411.00 | N |
| 026929 | 06-06-2024 | TK SALES | 201939 | | 199-51-6319.00-999-499000 | Vacuums/ Bags/ Supplies | 5,768.44 | N |
| 026930 | 06-06-2024 | VERIZON | 007329 | | 199-11-6239.03-101-411000 | APRIL MOBILE.HOTSPORT | 464.21 | N |
| | | | 007329 | | 199-11-6239.03-101-411000 | MAY MOBILE.HOTSPORT | 552.28 | N |
| | | | | | | **Totals for Check 026930** | **1,016.49** | |
| 026931 | 06-06-2024 | WALSH GALLEGOS KYL | 007331 | | 199-41-6211.01-701-423000 | LEGAL FEES SPECIAL ED | 5,816.94 | N |
| 026932 | 06-06-2024 | WATCHFIRE | 201931 | | 199-51-6319.00-999-499000 | Baseball Scoreboard Repair | 493.97 | N |
| 026933 | 06-06-2024 | WICKSON CREEK SPECI | 007332 | | 199-51-6259.03-999-499000 | WATER SERVICE | 21.77 | N |
| 026934 | 06-06-2024 | WINDSTREAM | 007330 | | 199-11-6239.03-101-411000 | INTERNET | 753.16 | N |
| 026935 | 06-14-2024 | BROTHERS PRODUCE | 201944 | 04847100 | 240-35-6341.00-999-499000 | CAFE FOOD | 463.00 | N |
| 026936 | 06-14-2024 | GAAS REFRIGERATION, | 201946 | | 240-35-6249.00-999-499000 | CAFE EQUIPMENT REPAIRS | 6,567.73 | N |
| 026937 | 06-14-2024 | GORDON FOOD SERVIC | 201942 | | 240-35-6341.00-999-499000 | CAFE FOOD | 5,154.71 | N |
| | | | 201943 | 9009544314 | 240-35-6341.01-999-499000 | SB FOOD | 147.50 | N |
| | | | 201942 | | 240-35-6342.00-999-499000 | CAFE NON FOOD | 803.36 | N |
| | | | | | | **Totals for Check 026937** | **6,105.57** | |
| 026938 | 06-14-2024 | GRIMES COUNTY SP ED | 007336 | 6.1.24 | 199-93-6492.00-999-423000 | 2ND PAYMENT | 97,092.40 | N |

| Check Nbr | Check Date | Payee | PO Nbr | Invoice Nbr | Fnd-Fnc-Obj.So-Org-Prog | Reason | Amount | EFT |
|---|---|---|---|---|---|---|---|---|
| 026939 | 06-14-2024 | HILAND DAIRY FOODS C | 201945 | | 240-35-6341.00-999-499000 | CAFE FOOD | 2,252.26 | N |
| 026940 | 06-17-2024 | BULK BOOKSTORE | 201940 | 172117 | 199-12-6329.00-001-411000 | CLASSROOM SUPPLIES | 238.50 | N |
| 026941 | 06-17-2024 | HUNTSVILLE ATHLETICS | 007337 | | 199-36-6499.00-001-491000 | BB PLAYOFF SITE | 1,655.71 | N |
| 026942 | 06-17-2024 | REGION IV | 201907 | F106127 | 199-12-6329.00-001-411000 | Dyslexia materials | 53.04 | N |
| 026944 | 06-24-2024 | BULL CREEK HOMES, LL | 007341 | 138 | 199-51-6299.00-999-499000 | REWORK ADMIN LANDSCAPING | 2,500.00 | N |
| | | | 007341 | 139 | 199-51-6299.00-999-499000 | WATERHEATER RELOCATION | 4,765.00 | N |
| | | | 007341 | 140 | 199-51-6299.00-999-499000 | ADMIN GUTTERS | 2,837.00 | N |
| | | | | | | **Totals for Check 026944** | **10,102.00** | |
| 026945 | 06-24-2024 | THE STEAMERY, INC. | 007340 | 24192 | 199-51-6299.00-999-499000 | ADMIN BUILDING REPAIR (1) | 15,757.00 | N |
| 026946 | 06-25-2024 | THE STEAMERY, INC. | 201941 | 24046 | 199-51-6299.00-999-499000 | Water Extraction Admin | 13,180.50 | N |
| 026947 | 06-26-2024 | WELLS FARGO 3357 | 007342 | | 199-13-6411.00-999-411000 | PROFESSIONAL DEV GLASS | 182.00 | N |
| | | | 007342 | | 199-23-6499.01-001-411000 | HS SUPPLIES | 110.00 | N |
| | | | 007342 | | 199-36-6411.00-001-491000 | DISTRICT MEETING | 282.72 | N |
| | | | 007342 | | 199-51-6259.00-999-499000 | COMMUNICATION | 106.61 | N |
| | | | | | | **Totals for Check 026947** | **681.33** | |
| 026948 | 06-26-2024 | WELLS FARGO #8329 | 007343 | | 199-11-6411.00-001-423000 | SPECIAL ED TRIP | 20.19 | N |
| | | | 007343 | | 199-11-6499.01-001-411000 | 8TH GRADE CELEBRATION | 80.60 | N |
| | | | 007343 | | 199-13-6399.01-999-411000 | HS SUPPLIES | 20.98 | N |
| | | | 007343 | | 199-13-6399.01-999-411000 | HS SUPPLIES | 136.00 | N |
| | | | 007343 | | 199-13-6399.01-999-411000 | HS SUPPLIES | 101.13 | N |
| | | | 007343 | | 199-23-6411.00-001-411000 | HS TRAVEL | 270.07 | N |
| | | | 007343 | | 199-36-6411.00-001-491000 | BASEBALL MEALS | 220.06 | N |
| | | | 007343 | | 199-51-6259.00-999-499000 | MIDSOUTH | 106.61 | N |
| | | | 007343 | | 199-51-6319.00-999-499000 | MOVING BOXES | 643.76 | N |
| | | | | | | **Totals for Check 026948** | **1,599.40** | |
| 026949 | 06-30-2024 | BSN SPORTS, LLC | 201895 | 925909341 | 199-36-6399.07-001-491000 | Football supplies | 7,513.34 | N |
| | | | 201895 | 925909341 | 199-36-6399.20-001-491000 | Football supplies | 832.68 | N |
| | | | | | | **Totals for Check 026949** | **8,346.02** | |
| 026950 | 06-30-2024 | CHAPARRAL LABORATO | 201950 | 2406118/240611 | 199-51-6299.01-999-499000 | Lab Work / Bac -T | 835.00 | N |
| 026951 | 06-30-2024 | DEALERS ELECTRICAL | 201963 | | 199-51-6299.12-999-499000 | Kill switch/MISC MAINT | 1,063.06 | N |
| 026952 | 06-30-2024 | DRUG AND ALCOHOL TE | 201958 | 18213076 | 199-34-6299.00-999-499000 | drug testing | 171.90 | N |
| 026953 | 06-30-2024 | DSHS CENTRAL LAB | 201959 | | 199-51-6299.01-999-499000 | water testing | 852.00 | N |
| 026954 | 06-30-2024 | ENTERGY | 007356 | | 199-51-6259.01-999-499000 | MAIN CAMPUS BUILDINGS | 8,838.62 | N |
| 026955 | 06-30-2024 | GRIMES COUNTY ELECT | 007352 | | 199-41-6439.00-702-499000 | BM ELECTION FEE | 8,108.41 | N |
| 026956 | Void | | | | | | | |
| 026957 | 06-30-2024 | HCTRA | 007358 | | 199-34-6399.00-999-499000 | TOLL FEES | 58.50 | N |
| 026958 | 06-30-2024 | MADISONVILLE C.I.S.D. | 007354 | 821 | 199-11-6299.00-001-428000 | DAEP SERVICES (43) DAYS | 4,300.00 | N |
| 026959 | 06-30-2024 | TXTAG | 007357 | | 199-34-6399.00-999-499000 | TOLL FEE | 19.64 | N |

| Check Nbr | Check Date | Payee | PO Nbr | Invoice Nbr | Fnd-Fnc-Obj.So-Org-Prog | Reason | Amount | EFT |
|---|---|---|---|---|---|---|---|---|
| 026960 | 06-30-2024 | VALLEY VALVE & PIPE S | 201961 | 401891 | 199-51-6319.00-999-499000 | Football Irrigation | 1,242.93 | N |
| 026961 | 06-30-2024 | WINDSTREAM | 007355 | | 199-51-6259.00-999-499000 | WINDSTREAM | 1,943.19 | N |

**Total For Computer Written Checks**

**Total Checks**

**End of Report**

**IOLA INDEPENDENT SCHOOL DISTRICT**
**IOLA, TEXAS**

**MEMORANDUM**

**TO:** Iola ISD Board of Trustees

**From:** Jeff Dyer, Superintendent

**DATE:** July 15, 2024

**SUBJECT:** Campus and Administrative report (Item 5)

a. superintendent report

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Respectfully submitted,

Jeff Dyer
Superintendent

**IOLA INDEPENDENT SCHOOL DISTRICT**
**IOLA, TEXAS**

**MEMORANDUM**

**TO:** Iola ISD Board of Trustees

**From:** Jeff Dyer, Superintendent

**DATE:** July 15, 2024

**SUBJECT:** Consideration of approval of the local investment policy
(Item 6)

Enclosed in your packet you will find TASB Policy CDA(LOCAL). The investment management policy for the district funds shall be in accordance with the standard of care, investment training, and other requirements set forth in Government Code Chapter 2256. The Superintendent or other person designated by Board resolution shall serve as the investment officer of the district.

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It is recommended to the Board of Trustees to approve the local investment policy CDA (LOCAL)

Respectfully submitted,

Jeff Dyer
Superintendent

**Investment Authority**

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

**Approved Investment Instruments**

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

1. Obligations of, or guaranteed by, governmental entities as permitted by Government Code 2256.009.
2. Certificates of deposit and share certificates as permitted by Government Code 2256.010.
3. Public funds investment pools as permitted by Government Code 2256.016.

**Safety**

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

**Investment Management**

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

**Liquidity and Maturity**

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

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

**Diversity**

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

**Monitoring Market Prices**

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

**Monitoring Rating Changes**

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

**Funds/Strategies**

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

Operating Funds

Investment strategies for operating funds (including any commingled pools containing operating funds) shall have as their primary objectives preservation and safety of principal, investment liquidity, and maturity sufficient to meet anticipated cash flow requirements.

Custodial Funds

Investment strategies for custodial funds shall have as their primary objectives preservation and safety of principal, investment liquidity, and maturity sufficient to meet anticipated cash flow requirements.

Debt Service Funds

Investment strategies for debt service funds shall have as their primary objective sufficient investment liquidity to timely meet debt service payment obligations in accordance with provisions in the bond documents. Maturities longer than one year are authorized provided legal limits are not exceeded.

Capital Project Funds

Investment strategies for capital project funds shall have as their primary objective sufficient investment liquidity to timely meet capital project obligations. Maturities longer than one year are authorized provided legal limits are not exceeded.

**Safekeeping and Custody**

The District shall retain clearly marked receipts providing proof of the District's ownership. The District may delegate, however, to an investment pool the authority to hold legal title as custodian of investments purchased with District funds by the investment pool.

**Sellers of Investments**

Prior to handling investments on behalf of the District, a broker/dealer or a qualified representative of a business organization must submit required written documents in accordance with law. [See Sellers of Investments, CDA(LEGAL)]

Representatives of brokers/dealers shall be registered with the Texas State Securities Board and must have membership in the Securities Investor Protection Corporation (SIPC) and be in good standing with the Financial Industry Regulatory Authority (FINRA).

**Soliciting Bids for CDs**

In order to get the best return on its investments, the District may solicit bids for certificates of deposit in writing, by telephone, or electronically, or by a combination of these methods.

**Interest Rate Risk**

To reduce exposure to changes in interest rates that could adversely affect the value of investments, the District shall use final and weighted-average-maturity limits and diversification.

The District shall monitor interest rate risk using weighted average maturity and specific identification.

**Internal Controls**

A system of internal controls shall be established and documented in writing and must include specific procedures designating who has authority to withdraw funds. Also, they shall be designed to protect against losses of public funds arising from fraud, employee error, misrepresentation by third parties, unanticipated changes in financial markets, or imprudent actions by employees and officers of the District. Controls deemed most important shall include:

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

7. Avoidance of bearer-form securities.

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

**Annual Review**

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

**Annual Audit**

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

**IOLA INDEPENDENT SCHOOL DISTRICT**
**IOLA, TEXAS**

**MEMORANDUM**

**TO:** Iola ISD Board of Trustees

**From:** Jeff Dyer, Superintendent

**DATE:** July 15, 2024

**SUBJECT:** Consideration of adopting the Board Operating Procedure Handbook (Item 7)

The Board Operating Procedure Handbook workshop was held July 15th at 6:00 p.m. to finalize the updates.

**********

It is recommended to the Board of Trustees to approve the Board Operating Procedure Handbook updates.

Respectfully submitted,

Jeff Dyer
Superintendent

**IOLA INDEPENDENT SCHOOL DISTRICT**
**IOLA, TEXAS**

**MEMORANDUM**

**TO:** Iola ISD Board of Trustees

**From:** Jeff Dyer, Superintendent

**DATE:** July 15, 2024

**SUBJECT:** Consideration of TASB Policy Manual Update 123 first read (Item 8)

Enclosed in your packet you will find our TASB Local Policy overview.

**********

It is recommended that the Board of Trustees add, revise, or delete (local) policies as recommended by TASB Policy Services and according to the Instruction Sheet for TASB Policy Manual Update 123.

Respectfully submitted,

Jeff Dyer
Superintendent

# Explanatory Notes

# TASB Localized Policy Manual Update 123

**Iola ISD**

**ATTN(NOTE) GENERAL INFORMATION ABOUT THIS UPDATE**

**Please note:**

Unless otherwise noted, references to legislative bills throughout these explanatory notes refer to Senate Bills (SB) or House Bills (HB) from the 88th Legislature, regular and special sessions. All referenced bills have already gone into effect unless otherwise noted.

The Local Policy Overview for Update 123, available with your Update 123 materials under Local Manual Updates on Policy Online® (TASB login required), provides a general, high-level overview of the changes to the local policies included in the update. **Legal policies provide the legal framework for key areas of district operations and are not adopted by the board.**

**AIB(LEGAL) ACCOUNTABILITY: PERFORMANCE REPORTING**

The Results Driven Accountability (RDA) section of the policy has been deleted. TEA included RDA information in the Accountability Manual starting in 2023 and repealed the RDA information in the Administrative Code. This change aims to streamline information used in academic accountability and RDA systems.

**AIC(LEGAL) ACCOUNTABILITY: INTERVENTIONS AND SANCTIONS**

A citation to the Administrative Code has been included under Student Enrollment and Assignment, Enrollment Provision in Contract, regarding campuses that are closed and repurposed.

As 19 TAC 97.2005 has been repealed, the reference to Results Driven Accountability has been deleted from the section on Special Program Performance Determination.

**AIE(LEGAL) ACCOUNTABILITY: INVESTIGATIONS**

The word "accreditation" has been removed as a descriptor for investigations in two places within the policy after an amendment to the Administrative Code, effective January 17, 2024.

**BBA(LEGAL) BOARD MEMBERS: ELIGIBILITY/QUALIFICATIONS**

At Intent to Return, language from the Election Code has been included to minimize confusion regarding the specific requirements for establishing an intent to return to the individual's residence after a temporary absence.

**BBBB(LEGAL) ELECTIONS: POST-ELECTION PROCEDURES**

HB 5180 added new requirements for public inspection of election records. A reference has been added at Election Records regarding where to find information on public inspection of those records for districts who serve as custodians of their own election records.

**BBD(LOCAL) BOARD MEMBERS: TRAINING AND ORIENTATION**

HB 3033 authorizes the attorney general to require trustees to complete training on the Public Information Act if the attorney general finds that there has been a violation of the Act. Language is recommended to make clear that this training after a violation cannot be delegated to the district's Public Information Act coordinator.

**BBFA(LOCAL) ETHICS: CONFLICT OF INTEREST DISCLOSURES**

Language is recommended to clarify that a trustee's ethical duty to disclose a financial or other personal interest in board transactions goes beyond the statutory conflicts of interest set out in state and federal law. The added language serves to demonstrate a commitment to avoid undue influence, increase transparency, and avoid the appearance of impropriety in public dealings.

**Iola ISD**

**CCG(LEGAL) LOCAL REVENUE SOURCES: AD VALOREM TAXES**

HB 3273, effective January 1, 2024, revised the Tax Code and requires a taxing unit, including a school district, to provide specific notice to property owners on its website. These provisions have been included in the Appraisal District Property Tax Database section of the policy.

**CCGA(LEGAL) AD VALOREM TAXES: EXEMPTIONS AND PAYMENTS**

This policy has been updated to indicate that a board that adopted an exemption for the 2022 tax year may not reduce the amount or repeal that exemption based on SB 2 from the second special session of the 88th Legislature. [See Homestead, Local Options.]

HB 4559, from the 88th regular session, increased the population range for certain districts to provide that the split payment option does not apply to the district's taxes collected by another taxing unit that has adopted that option. [See Split Payments, In Certain Counties.]

**CCGB(LEGAL) AD VALOREM TAXES: ECONOMIC DEVELOPMENT**

HB 4559 increased the population threshold for determining a large municipality for provisions related to the appointment of reinvestment zone board members. [See Tax Increment Financing Act, Large Municipality.]

Substantial changes have also been made based on HB 5 to incorporate the Texas Jobs, Energy, Technology, and Innovation Act.

**CCGB(LOCAL) AD VALOREM TAXES: ECONOMIC DEVELOPMENT**

Substantial changes are recommended to remove provisions addressing expired laws related to Tax Code Chapter 313 agreements. If your district consulted with legal counsel to revise this policy, we recommend discussing the proposed revisions with them. If the district's agreements have expired completely, please contact your policy consultant for additional revisions.

**CKB(LEGAL) SAFETY PROGRAM/RISK MANAGEMENT: ACCIDENT PREVENTION AND REPORTS**

TEA's amendments to the Administrative Code rules for mandatory school drills necessitated reorganization of definitions and added clarity to several sections of the policy. Changes in this policy also reflect TEA's amendments to the Administrative Code rules related to active threat exercises.

**CKC(LOCAL) SAFETY PROGRAM/RISK MANAGEMENT: EMERGENCY PLANS**

A section on Notice Regarding Violent Activity is recommended to comply with legal requirements. Administrative procedures must be created to align with TEA's model standards.

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

To address in one policy all security arrangements a district may have implemented, we have added CKE(LOCAL) and moved the relevant provisions from CKEC(LOCAL) to this code.

Significant revisions are recommended to the CKE policy series to promote compliance and clarification with HB 3 and other legal requirements.

Provisions relating to school resource officers have been edited to clarify that a district may have agreements with multiple law enforcement agencies depending on district needs and jurisdiction. A statement regarding the jurisdiction of school resource officers has been added. The policy also now includes a list of authority and duties as reflected in the controlling memorandum of understanding.

## Iola ISD

Based on the district's security survey responses, provisions regarding individuals authorized to possess firearms have been included in this policy.

The Legal Issues in Update 123 memo, available with your Update 123 materials under Local Manual Updates on Policy Online (TASB login required), describes common legal concerns and best practices specific to this policy's topic.

**CKEC(LOCAL) SECURITY PERSONNEL: SCHOOL RESOURCE OFFICERS**

To address in one policy all security arrangements the district has implemented, we have deleted this policy and moved the provisions to CKE(LOCAL).

**CKED(LEGAL) SECURITY PERSONNEL: OTHER SECURITY ARRANGEMENTS**

The provisions of this policy address commissioned security officers with Level III training under the Department of Public Safety hired through a security services contractor or as a district employee in accordance with the Education Code and the Occupations Code.

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

Cross-references throughout this policy have been updated to EFA since policy EF has been separated into EFA (instructional materials) and EFB (library materials).

**CPC(LEGAL) OFFICE MANAGEMENT: RECORDS MANAGEMENT**

Edits to this policy at Destruction of Records remove a reference to 13 TAC 7.123(c), which was deleted from Texas State Library and Archives Commission rules, effective March 6, 2024.

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

HB 3273, effective January 1, 2024, requires school districts to post a notice informing property owners of the property tax database maintained by the appraisal district. Language has been added at item 28 under the section on Other Required Internet Postings.

**CQC(LEGAL) TECHNOLOGY RESOURCES: EQUIPMENT**

A section on Guidelines for Use of Digital Devices has been added to address the TEA and Health and Human Services Commission model health and safety guidelines for the use of digital devices, which are required by the Education Code and were issued in October 2023.

**CQC(LOCAL) TECHNOLOGY RESOURCES: EQUIPMENT**

This new local policy is recommended to meet the legal requirement for the board to adopt a policy for the effective integration of digital devices in the district. The policy language adopts the model health and safety guidelines developed by TEA and the Health and Human Services Commission and clarifies that the superintendent must develop regulations for implementation.

**DGBA(LOCAL) PERSONNEL-MANAGEMENT RELATIONS: EMPLOYEE COMPLAINTS/GRIEVANCES**

Extensive revisions within the CKE policy series necessitated an update to the cross-reference in the list of other complaint processes.

Also, to accommodate planned restructuring of policy DIA, we have revised the references to that code in this policy to reflect the DIA series. No other changes have been made to this policy.

## Iola ISD

The Legal Issues in Update 123 memo, available with your Update 123 materials under Local Manual Updates on Policy Online (TASB login required), describes common legal concerns and best practices specific to this policy's topic.

**DHE(LEGAL) EMPLOYEE STANDARDS OF CONDUCT: SEARCHES AND ALCOHOL/DRUG TESTING**

New Department of Transportation rules amend the department's regulated industry drug testing program. The language in the Reports to DPS section has been amended for clarity.

**DNA(LEGAL) PERFORMANCE APPRAISAL: EVALUATION OF TEACHERS**

Amendments to the Administrative Code allow districts to begin using the Alternate Domain I rubric as part of the Texas Teacher Evaluation and Support System (T-TESS) beginning with the 2024-25 school year. Language has been updated to reflect this change.

**DP(LEGAL) PERSONNEL POSITIONS**

The section on School Psychological Services has been amended to provide additional clarity and to set out the correct title for licensed specialists in school psychology (LSSPs) as indicated in the Administrative Code.

**EEH(LOCAL) INSTRUCTIONAL ARRANGEMENTS: HOMEBOUND INSTRUCTION**

TEA's revisions to the *Student Attendance Accounting Handbook* (*SAAH*) prompted recommended updates to this policy. Students may now receive homebound services for psychological, as well as medical, conditions. The *SAAH* also indicates that the weeks of confinement due to a medical or psychological condition do not need to be consecutive to qualify. The policy language has been updated to reflect this change.

**EF(LEGAL) INSTRUCTIONAL RESOURCES**

In order to clarify the differences in requirements for instructional materials and library materials, as well as to accommodate the new library collection development standards, policy EF has been divided into EFA (instructional material) and EFB (library material). The content in EF(LEGAL) has moved to either EFA or EFB, as appropriate.

**EF(LOCAL) INSTRUCTIONAL RESOURCES**

As explained at EF(LEGAL), above, this local policy addressing instructional resources is being deleted. New local policies to address instructional materials and library materials separately are included at EFA and EFB.

**EFA(LEGAL) INSTRUCTIONAL RESOURCES: INSTRUCTIONAL MATERIALS**

Content regarding instructional material review and federally required parental inspection has been moved from EF(LEGAL) to EFA(LEGAL).

**EFA(LOCAL) INSTRUCTIONAL RESOURCES: INSTRUCTIONAL MATERIALS**

The enclosed policy regarding instructional materials is recommended to coordinate with the policy addressing library materials at EFB(LOCAL). The provisions previously housed at EF(LOCAL) have been moved to this code with the following revisions:

**Iola ISD**

- At Selection, a clarification has been made to reflect that instructional materials must be chosen in accordance with stated objectives and administrative regulations and may include items from the State Board of Education list.
- At Reconsideration of Instructional Materials, the list of individuals who can submit a request for reconsideration has been revised. This change is recommended to align with the list provided in the new EFB(LOCAL), which permits an employee or parent or guardian to submit these requests. If the district would like to expand this list, please contact your policy consultant.

Please review the information at Formal Reconsideration, which specifies who will receive forms requesting the reconsideration of instructional material and who will appoint a reconsideration committee. If the policy needs to identify a different position for these responsibilities, please contact your policy consultant for assistance with revisions.

The Legal Issues in Update 123 memo, available with your Update 123 materials under Local Manual Updates on Policy Online (TASB login required), describes common legal concerns and best practices specific to this policy's topic.

**EFB(LEGAL) INSTRUCTIONAL RESOURCES: LIBRARY MATERIALS**

EFB(LEGAL) has been revised to incorporate new library collection development standards adopted by the Texas State Library and Archives Commission (TSLAC), effective January 23, 2024. The policy includes a note regarding the Fifth Circuit Court of Appeals enjoinment and the resulting unenforceability of certain statutes related to library material. The TSLAC Library Collection Development Standards are not currently enjoined by the Fifth Circuit Court of Appeals.

**EFB(LOCAL) INSTRUCTIONAL RESOURCES: LIBRARY MATERIALS**

This recommended policy aligns with changes to the Administrative Code and the new collection development standards for school libraries as a result of HB 900. Please review the following information in your policy:

- The location of the form for formal reconsideration;
- The position title for the person responsible for appointing the reconsideration committee; and
- The number of days allocated for appointing the committee, providing the material for review to the committee, and completing the committee's final report.

If any information needs to be updated or if further revisions to the policy are needed, please contact your policy consultant for assistance.

**EHBAA(LEGAL) SPECIAL EDUCATION: IDENTIFICATION, EVALUATION, AND ELIGIBILITY**

A cross-reference to policy EHB has been included for additional requirements relating to the evaluation and identification process when dyslexia is a suspected disability. [See Determination of Initial Eligibility.]

**EHBAB(LEGAL) SPECIAL EDUCATION: ARD COMMITTEE AND INDIVIDUALIZED EDUCATION PROGRAM**

The section on Supplemental Special Education Services (SSES) has been revised to reflect amended Administrative Code rules, effective April 18, 2023. The district is required to notify parents of SSES eligibility and related information during an ARD committee meeting.

## Iola ISD

A provision regarding an IEP supplement for each child who was enrolled in a district's special education program during the 2019-20 school year or the 2020-21 school year has been removed. That requirement expired on September 1, 2023.

**EHBE(LEGAL) SPECIAL PROGRAMS: BILINGUAL EDUCATION/ESL**

Extensive revisions have been made throughout this policy to reflect amended rules relating to emergent bilingual students.

**EHBJ(LEGAL) SPECIAL PROGRAMS: INNOVATIVE AND MAGNET PROGRAMS**

Changes to this policy stem from amended Administrative Code provisions relating to innovative courses. The amended rules became effective February 18, 2024.

**EKB(LEGAL) TESTING PROGRAMS: STATE ASSESSMENT**

Revisions have been made to remove language that does not require district action to aid in readability and clarity. Citations have also been updated based on rule changes.

**FA(LEGAL) PARENT RIGHTS AND RESPONSIBILITIES**

The cross-reference at Parental Rights relating to teaching materials has been updated to reflect the division of policy EF into EFA and EFB.

**FFAC(LEGAL) WELLNESS AND HEALTH SERVICES: MEDICAL TREATMENT**

A section on Telehealth in Medicaid Covered Services has been added to provide guidance from Administrative Code rules specific to telehealth services authorized as Texas Medicaid covered services.

The section on opioid antagonists has been updated to reflect new rules effective November 1, 2023.

Changes have also been made to the section on epinephrine auto-injectors to reflect amended Administrative Code rules.

Citations throughout have been updated based on rule amendments.

**FNG(LOCAL) STUDENT RIGHTS AND RESPONSIBILITIES: STUDENT AND PARENT COMPLAINTS/GRIEVANCES**

Extensive revisions within the CKE policy series necessitated an update to the cross-reference in the list of other complaint processes.

Also, to accommodate planned restructuring of policy FFH, we have revised the references to that code in this policy to reflect the FFH series. No other changes have been made to this policy.

The Legal Issues in Update 123 memo, available with your Update 123 materials under Local Manual Updates on Policy Online (TASB login required), describes common legal concerns and best practices specific to this policy's topic.

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

A cross-reference regarding economic development negotiations under Government Code Chapter 403 has been added.

**GF(LEGAL) PUBLIC COMPLAINTS**

The division of policy EF into EFA and EFB necessitated an update to the cross-reference in this policy.

# Explanatory Notes

# TASB Localized Policy Manual Update 123

## Iola ISD

**GF(LOCAL)** **PUBLIC COMPLAINTS**

Extensive revisions within the CKE policy series necessitated an update to the cross-reference in the list of other complaint processes. No other changes have been made to this policy.

The Legal Issues in Update 123 memo, available with your Update 123 materials under Local Manual Updates on Policy Online (TASB login required), describes common legal concerns and best practices specific to this policy's topic.

**GKA(LEGAL)** **COMMUNITY RELATIONS: CONDUCT ON SCHOOL PREMISES**

Amendments to the Code of Federal Regulations necessitated changes to the section regarding operation of a small unmanned aircraft system.

**GRA(LEGAL)** **RELATIONS WITH GOVERNMENTAL ENTITIES: STATE AND LOCAL GOVERNMENTAL AUTHORITIES**

The Definitions section has been revised to reflect amended Administrative Code rules that include school resource officers and contracted police officers in the definition of "school personnel and volunteers."

Language has been added at Notice to School Personnel to provide direction if the superintendent is the individual alleged to have committed child abuse or neglect.

The Students Taken into Custody section has been updated to incorporate appropriate legal citations and improve clarity.

**IOLA INDEPENDENT SCHOOL DISTRICT**
**IOLA, TEXAS**

**MEMORANDUM**

**TO:** Iola ISD Board of Trustees

**FROM:** Jeff Dyer, Superintendent

**DATE:** July 15, 2024

**SUBJECT:** Consideration of approving Right-of-Way easements to the City of Iola for the purpose of Wastewater Treatment Plant (Item 9)

The City of Iola is in need of additional right-of-way easements in order to move forward with the Wastewater Treatment Plant. The easement plans have been revised and will be available for your review at the board meeting.

**********

It is recommended that the Board of Trustees approve the Right-of-Way easements to the City of Iola for the purpose of Wastewater Treatment Plant

Respectfully submitted,

Jeff Dyer
Superintendent

**IOLA INDEPENDENT SCHOOL DISTRICT**
**IOLA, TEXAS**

**MEMORANDUM**

**TO:** Iola ISD Board of Trustees

**From:** Jeff Dyer, Superintendent

**DATE:** July 15, 2024

**SUBJECT:** Personnel (Item 10)

a. Employment: none
b. Resignation: none

Any employment or resignations will be presented at board meeting if needed.

**********

Respectfully submitted,

Jeff Dyer
Superintendent