

Union Public Schools



Board of Education Policies

2025-2026

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The Board of Education of Union Public Schools believes that student achievement programs and parent/teacher associations and organizations can advance the educational goals of the Board and confer a benefit to the students of the district. It is the purpose of this policy to establish guidelines for the sanctioning of parent-organized and operated student achievement programs and parent/teacher/student associations and organizations that raise money and collect revenues for the benefit of students. Only those parent-organized and operated student achievement programs and parent/teacher/student associations and parent 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

- A. The district may sanction parent-organized and operated student achievement programs and parent/teacher associations and parent-organized and operated organizations that, according to the Board of Education's determination, advance the educational objectives of the district, are beneficial to students and meet the requirements of this policy.
- B. In determining whether a parent-organized and operated 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. A parent-organized and operated booster club shall support a program, team, club or organization and not duplicate the mission of another previously sanctioned organization.
- C. An annual application by a parent-organized and operated student achievement program or by a parent/teacher association or parent-organized and operated organization to the Board of Education requesting sanctioning shall include the following:
 - (1) a statement of nondiscrimination consistent with all state and federal laws;
 - (2) the organization's most recent annual financial report, and financial and performance audits, if any, which have been performed by an independent accounting firm or any other audit process;
 - (3) a statement from the president and treasurer that they will follow proper bookkeeping practices to ensure the safeguarding of all assets and file all necessary IRS forms including 1099s and W-2s; and
 - (4) the dates they attended the required sanctioning workshop(s).

The application to obtain or renew is due to the Chief Financial Officer (CFO) by each October 15 and whenever officers change, but no less frequently than annually. Notification must be provided to the CFO within 30 days of any change in organization officers or district sponsors with the exception of annual officer elections. Individuals shall be limited to serving as President, Treasurer or Fundraising Chair of one sanctioned organization per year. **Married individuals (or individuals living in the same household) are prohibited from serving as club officers at the same time.**

- D. The sanctioning application shall be submitted to the CFO or Superintendent or designee for preliminary review. After the program, association or parent organization's written statement has been reviewed by the Superintendent or designee, the CFO/Superintendent shall make a recommendation to the Board of Education. The Board shall review the application and shall sanction or decline to sanction the applicant. The decision of the Board of Education is final and non-appealable. The organization has the option of reapplying for sanctioning.
- E. In order to maintain the status of a sanctioned program, association or organization in accordance with this policy, the Superintendent, Chief Financial Officer or the Board of Education may require from any such program, association or organization that financial and performance audits by an independent accounting firm be performed on an annual basis on the program, association or organization. If required by the Superintendent, CFO or the Board of Education, the audits or any other requested information shall be submitted to the Superintendent within 90 days of the request. The submitted audits, other financial statements or other information shall be reviewed to 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.
- F. The Superintendent, CFO 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, including tax records. Copies of records must be promptly provided upon the request. If required, the audits or any other requested information shall be submitted within five (5) days to the Superintendent or CFO. The district reserves the right to review all financial records and/or perform spot audits throughout the year.

- G. The Board of Education 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.
- H. The sanctioning of any program, association or organization under this policy by the Board of Education, is not intended to reflect any opinion by the Board or any employee of the district that the financial, performance or other records of the parent association or parent organization are accurate or should be relied on by any person in any manner. Further, the Board of Education and all employees of the district specifically disclaim any and all liability for any obligation, loss of funds, misfeasance or malfeasance of any representative of any program, association or organization sanctioned under this policy. Therefore, employees of the district may not serve as the treasurer of any parent booster club or PTA.
- I. Sanctioned organizations may not use the district's tax ID number.
- J. Due to filing and reporting obligations imposed on the district by the IRS, sanctioned organizations shall not employ and/or pay district employees or hire independent contractors or outside employees without prior written approval by the Superintendent or Chief Financial Officer. District employees may not be paid for services by the parent-operated booster club or PTA. Any request for payments to be made for services rendered to a district employee must receive written approval in advance of any services being rendered so the funds can be given to the district and all payments for services paid by the district and not the booster club.
- K. Sanctioned organizations must issue all appropriate 1099s, W-2s and all other annual tax forms as required by law and should submit copies of such filed tax forms to the Chief Financial Officer no later than 30 days after filing date of each year.
- L. Employees of the district shall not have direct access to booster club, PTA, or student club bank accounts and may not serve as a booster club or PTA treasurer.
- M. Sanctioned organizations are prohibited from holding credit card accounts in the name of the organization.
- N. Teacher-sponsored student clubs shall fall under the control of the Board of Education and do not qualify to become sanctioned organizations.
- O. No raffles and/or raffle-type activities are permitted. Silent auctions are permitted.
- P. No district logos shall be used without prior written permission from the Superintendent or designee.
- Q. Fund Raising:
 - A. Recognizing the importance of parent-teacher groups, district schools may assist with requests for facility use from school-supportive organizations;
 - B. All use of school facilities must be authorized and scheduled by the appropriate administrative personnel;
 - C. The district discourages going door-to-door by elementary students, without adult supervision.
 - D. All funds raised by parent-teacher associations shall remain the property of the parent-teacher association unless gifted to the district;
 - E. All property and non-consumable items given to the schools shall be presented to the Board of Education as a gift and shall become and remain the property of the district;
 - F. Prior approval from the principal must be given for the purchase of equipment or service for the schools.

Adopted 12/9/96

Revised 12/8/97

Revised 12/13/99

Revised 12/13/04

Revised 1/16/06

Revised 12/10/07

Revised 11/10/08

Revised 1/18/10

Revised 12/12/11

Revised 12/10/12

Revised 12/9/13

Revised 11/14/16

Revised 12/11/17

Revised 12/9/19

Revised 12/14/20

Revised 12/13/21

Proposed Revision 11/10/25

The district, as a tax supported institution, recognizes that the public has a right to be fully informed concerning its operations. The district strongly believes that informed citizens are vital to the successful functioning of the democratic process which the district desires to exemplify to its students.

In order to achieve these goals, the Board of Education hereby states that all records of the district, except those designated as confidential in this policy statement, shall be open to any person for inspection, copying and/or mechanical reproduction during regular business hours. All persons requesting the right to inspect non-confidential records of the district shall be accorded prompt access to those records.

The district hereby designates the following records as confidential and not open for public inspection:

- A. Records which can be kept confidential under federal or state law.
- B. Personnel records which relate to internal personnel investigations, including examination and selection material for employment, hiring, appointment, promotion, demotion, discipline or resignation.
- C. Personnel records where disclosure would constitute a clearly unwarranted invasion of personal privacy such as employee evaluations, payroll deductions or employment applications submitted by persons not hired.
- D. Bid specifications for competitive bidding prior to publication, contents of sealed bids prior to bid opening, computer programs or software (but not the data thereon), and appraisals relating to the sale or acquisition of real estate prior to the award of a contract if disclosure would give an unfair advantage to competitors or bidders. Proposal submissions, evaluations, evaluation results, and proposal, bid, and quote tabulations and summaries will not be released until after the project has been awarded or closed out if the project is not awarded.
- E. Except for the fact that a communication has been received and that it is or is not a complaint, personal communications received from a person exercising rights secured by the Oklahoma or United States Constitution. Any response to such personal communications shall be confidential only to the extent necessary to protect the identity of the person exercising the right.
- F. Individual student records, except for:
 - 1. Statistical information not identified with a particular student, if such information is maintained in a composite form.
 - 2. Directory information as defined in the Act if, pursuant to the Family Educational Rights and Privacy Act, (a) that information has been designated by the district as directory information, and (b) parents have been notified of and have not exercised their non-release rights.
- G. Teacher lesson plans, tests and other teaching materials.
- H. Personal communications concerning individual students.
- I. Prior to taking action, including making a recommendation or issuing a report, personal notes and personally created materials of district personnel, excluding departmental budget requests, prepared as an aid to memory or research leading to the adoption of a district policy or district project.

All requests for information may be received between the hours of 8 a.m. and 5 p.m. Requests will not be considered when the offices are closed.

If inspection of documents designated as confidential is denied, the person requesting access to such documents shall have a right to appeal the denial to the Board of Education.

PROCEDURES

In compliance with the Oklahoma Open Records Act, the following administrative procedures are established:

Any request for information should be sent to the Chief Communications Officer at the Education Service Center. The person(s) requesting the information may be required to submit a formal request for such information on forms provided by the district. The formal request form must be completed in all respects.

If a records request does not describe the requested records with reasonable specificity, the district will require the requestor to clarify the request. To have reasonable specificity, a request shall:

a. specify a general time frame within which the requested records would have been created or transmitted,

b. seek identifiable records, rather than general information without any qualifiers or other specifications, and

c. include search terms that are sufficiently specific to assist the public body in identifying the requested records.

If the district has engaged with the requestor to seek the information needed to fulfill the request and to identify the records sought by the requestor, including providing the requestor with general topics or a specific list of records related to the request, the request may be denied if it is still not reasonably specific.

The district shall charge reasonable fees to recover the costs associated with document copies and searches for documents as permitted by the Act. In that regard, search fees shall be charged in the following circumstances: (1) If the request is solely for a commercial purpose or (2) if the request would clearly cause an excessive or substantial disruption of the essential functions of the district, regardless of who the requesting party is, including but not limited to, news media, scholars, authors, and taxpayers. Search fees will be charged as follows:

- A. Time of non-administrative personnel at \$20 per hour.
- B. Time of administrative personnel at \$40 per hour.

Time will be calculated on quarter-hour increments. If a computer query or programming is required, it will be at the rate of \$100 per hour.

The following copying costs may also be charged:

- A. 8 1/2" x 11" copies at 25 cents per page.
- B. 8 1/2" x 14" copies at 25 cents per page.
- C. Computer printouts at 50 cents per page.
- D. Dubs of audio tapes at \$6.00 each.
- E. Dubs of video tapes at \$15.00 each.
- F. Material on disk or electronically provided at \$10.00 each.

All fees will be collected in advance.

Revised 6/10/96

Revised 12/13/99

Revised 1/13/03

Revised 12/13/04

Revised 1/16/06

Revised 2/12/07

Revised 12/10/07

Revised 12/14/15

Revised 12/11/17

Revised 8/13/18

Revised 12/13/21

Proposed Revision 11/10/25

Oklahoma law does not require district-provided transportation. However, Union Public Schools provides some transportation for the convenience of its students when funds are made available.

For purposes of clarification, the following terms are defined:

Director of Transportation: The person hired by the Board of Education who is responsible for the operation of student transportation services.

School bus/CDL driver: Any person who, while working for the district, operates a vehicle requiring a Commercial Driver's License (CDL).

School bus: Any vehicle owned or leased by the District and used to transport students to and from school and related events as defined by the Oklahoma State Department of Education.

SCHOOL BUS MAINTENANCE POLICIES

- A. All school buses purchased and/or used by the district will meet or exceed any and all state and federal minimum safety construction standards.
- B. Annual inspections: Each school bus will be mechanically inspected as required by state law.
- C. Pre-trip inspection: A driver shall perform a pre-trip inspection of the vehicle prior to each route or trip. The inspection shall include, but not be limited to, brakes, lights, tires, exhaust system, gauges, windshield wipers, steering, and fuel. The driver shall make a daily written report, unless digital reporting is available describing the condition of the bus and listing any deficiencies. The Transportation office will provide forms for this report with listing of the minimum inspection items. This report is to remain on file with the Director of Transportation for a period of 90 days.
- D. Any school bus deemed unsafe shall immediately be placed out of service until all necessary repairs are made. All repairs to school buses shall be made by a duly qualified automotive technician.
- E. It is the responsibility of all drivers to clean and refuel any bus entrusted to their operation following departmental procedures to accomplish these tasks. It is furthermore the responsibility of all bus drivers to complete a work order for repair or maintenance to any vehicle they should operate when such repair or maintenance is needed.
- F. The Transportation Department shall adopt and maintain a preventative maintenance schedule to prolong the life of all school buses and assure their safe operation.

SCHOOL BUS DRIVER POLICIES

- A. Any person employed as a school bus/CDL driver, whether full- or part-time, shall hold the appropriate driver's license and endorsements required by the Department of Public Safety for the operation of a school bus or other vehicle requiring a CDL.
- B. Any person employed as a school bus/CDL driver, whether full- or part-time, shall hold a school bus driver's certificate as required by the State Department of Education.
- C. The driving records of all school bus/CDL drivers shall be checked annually, and all drivers must meet the requirements of the SDE for school bus/CDL driver's records. All new drivers shall have a felony check as required for other district personnel.
- D. All school bus/CDL drivers shall have on file in the Transportation office an annual health certificate signed by a physician licensed by the state, attesting that such physician has examined the applicant and/or bus/CDL driver and that the applicant and/or bus/CDL driver has no sign or symptoms of ill health and is otherwise, from the observation of such physician, physically and mentally capable of safely operating a school bus.
- E. The use of tobacco products, and/or electronic or vapor products/e-cigarettes (regardless of whether or not the electronic or vapor products/e-cigarettes contain tobacco or nicotine) by a school bus/CDL driver is not permitted during the operation of the bus while hauling students, and use of tobacco, tobacco products, and/or vapor products/e-cigarettes in any form is prohibited while on any district property, including district vehicles, per Board Policy #1500. The use of any intoxicating alcoholic beverage by the driver eight hours prior to or during the operation of a school bus is strictly prohibited. The use of any controlled dangerous substance 72 hours prior to or during the operation of a school bus is strictly prohibited. The possession of any controlled dangerous substance on a school bus is strictly prohibited. Marijuana, even with a state medical marijuana license, is illegal under Federal DOT regulations and is not allowed at any time.
- F. School bus/CDL drivers will be subject to drug and alcohol testing requirements under Board Policy #4026 and #4028.
- G. All school bus/CDL drivers shall be evaluated annually for job performance purposes as prescribed by district

personnel policies. In addition to standard employee evaluation criteria, school bus/CDL drivers shall also be evaluated for driving skills and student-management skills.

- H. Any school bus/CDL driver may be suspended with pay pending the outcome of an investigation into any charge of recklessly endangering the safety of persons or property while operating a school bus or any charge of moral turpitude involving children.
- I. All school bus/CDL drivers shall comply with requirements of the Director of Transportation regarding attendance and participation in periodic in-service safety meetings for the purpose of increasing student safety.
- J. Substitute and activity school bus/CDL drivers shall meet all the requirements prescribed for regular bus drivers.
- K. It is unlawful for any person to operate a school bus or multi-passenger vehicle on any street or highway within this state while:
 - 1. Using a cellular telephone or electronic communications device to write, send, or read a text message; or
 - 2. Using a hand-held mobile telephone while operating a school bus. Operate means operating on a street or highway, including while temporarily stationary because of traffic, a traffic control device or other momentary delays.

SCHOOL BUS ROUTING

- A. Transportation may be provided for and shall be restricted to the students of the district who reside within the boundaries of the district. Students who reside outside the district but attend Union Public Schools through a mutual agreement with a neighboring school district for a specific area, may be provided transportation service.
- B. The district may elect to not transport any student whose home is within one-and-one-half miles from the school attended by a commonly traveled road.

Students who reside in areas where walking to school is deemed hazardous by the Director of Transportation may be provided transportation service. Hazardous conditions are those which would place the student at risk.
- C. Parents are responsible to accompany students to the bus stop and see to their safety prior to the arrival of the bus and meet them at the bus stop to assume responsibility after school.
- D. All school bus routes shall be evaluated annually. A copy of the evaluation shall be forwarded to the government agency responsible for maintaining the roadway if any physical hazards are noted. If identifiable hazards exist on a school bus route, all drivers shall exercise due caution. Route and bus stop changes may be made at the discretion of the Director of Transportation or designee.
- E. School bus/CDL drivers may not deviate from established school bus routes and/or move school bus stops without the permission of the Director of Transportation.
- F. It is the duty of the parents or legal guardians to have their students at the bus stop at the proper time. No student may board any school bus at any place other than at a designated bus stop.
- G. No students shall be discharged from their school bus at any point except the designated bus stop without a bus pass. Passes are obtained from the Transportation office or, in an emergency, from the office of the school attended.

AUXILIARY OR ACTIVITY TRANSPORTATION

- A. Any person operating a school bus for auxiliary transportation purposes shall adhere to all school transportation policies regarding driver qualifications and operational procedures.
- B. No school buses will be utilized for any activity trip prohibited by State Department of Education regulations.
- C. It is the responsibility of the parents or legal guardians of all students riding activity buses to have their students at the designated site for departure and arrival of all activity trips.
- D. All adults transported in connection with activity trips must be designated sponsors. Buses will be scheduled for the use of students with no additional buses scheduled to accommodate sponsors. For scheduling purposes, there will be allowed two sponsors per bus, including teachers. Additional sponsors may ride on a space-available basis.
- E. Student groups wishing to utilize buses in non-school activities, must be approved by the Superintendent prior to bus use. Buses will only be operated by bus drivers employed by the district and in good standing as bus drivers. Transportation costs for all activities of this nature must be reimbursed at a standard rate.
- F. All requests for auxiliary transportation must be filed in writing with the Director of Transportation or designee ten days prior to the activity. Requests received less than ten days prior to the activity may be denied.

- G. The primary purpose for which the district maintains a school bus fleet is to transport students to and from school classes. Auxiliary transportation shall not interfere with the safe operation of these bus routes; therefore, activity trips are subject to denial or cancellation based on availability of buses and/or drivers.

STUDENT DISCIPLINE

- A. Due to the serious nature of student transportation, no disruptive behavior shall be tolerated on any school bus that might endanger the well-being of any student transported. The same level of behavior that is expected in the classroom is expected on the bus in addition to behavior that is specific to bus safety.
- B. The Transportation Department will establish disciplinary procedures for bus drivers to follow when dealing with disruptive students. Bus rules and discipline procedures will be made available to all students each year through handbooks and/or flyers, as well as rules being posted conspicuously in the bus.
- C. Students are subject to the same disciplinary measures for behavior on the bus or at bus stops, as for behavior in the classroom or on school grounds. In addition, students are subject to denial of bus privileges for any length of time at the discretion of the administrator imposing the discipline.
- D. Bus/CDL drivers are authorized to assign any and/or all seats in the bus for any reason or for any length of time.
- E. School bus behavior rules and discipline shall apply to both school bus routes and activity trips.

SCHOOL BUS ACCIDENTS AND EMERGENCIES

- A. All students transported in school buses shall receive instructions in safe riding practices and participate in emergency evacuation drills within the first two weeks of each semester. All students riding on activity trips shall also receive instruction on emergency procedures. These drills shall be conducted on school grounds. Documentation of these drills shall be kept on file in the Transportation office.
- B. All bus/CDL drivers shall receive instruction in emergency and evacuation procedures not less than once per year.
- C. The Director of Transportation shall develop specific accident procedures for reporting and investigation of accidents. All school bus accidents shall be investigated, and reported to the Superintendent and Human Resources.

TRANSPORTATION OF ~~SPECIAL-NEEDS~~ STUDENTS WITH DISABILITIES

- A. All students requiring transportation services that are specific to the student or beyond the scope of regular transportation services shall be provided such transportation only after an Individual Education Plan (IEP) is completed which specifically describes the need for transportation ~~needs of the student~~ as a related service.
- B. Individualized transportation for ~~special-needs-identified~~ students shall only be provided on an as-needed basis. The Transportation Department, Director of Special Education, or a representative should be consulted at all IEP meetings which address a student's transportation needs to determine the most applicable form of transportation. Whenever a student's disability may prove a safety hazard to other students on the bus (e.g., disruptive behavior, violent actions), alternative forms of transportation will be devised.
- C. ~~Special-needs-students~~ Students with disabilities are subject to disciplinary action within Special Education guidelines for behavior that presents a safety hazard to the bus and its passengers. In no instance will a student whose behavior constitutes a threat be allowed to continue to ride a bus.

TRANSPORTATION OF ADULTS AND NON-STUDENTS

School buses may be used to transport adults and/or non-students when the activity for which the transportation is provided is of benefit to the education or welfare of district students. Such adult and/or non-student groups transported in school buses must receive prior approval by the Superintendent or designee. Reimbursement of all expenses for such transportation shall be made at a reasonable cost not less than the actual cost for operation of the school buses unless waived by the Superintendent.

Adults and/or non-students who are assigned as sponsors by a principal for non-athletic events, or by the athletic director for athletic-related activities may ride on a bus which is providing transportation for student activities at no charge, provided space is available.

Revised 6/10/96

Revised 12/8/97

Revised 12/14/98

Revised 12/13/99

Revised 1/8/01

Revised 1/13/03

Revised 12/10/07

Revised 1/18/10

Revised 12/12/11

Revised 12/9/13

Revised 12/14/15

Revised 12/10/18

Revised 12/11/23

Revision Proposed 11/10/25

Information and information systems are necessary for the performance of almost every business activity at Union Public Schools. In the event of a serious security problem with this information or these information systems, Union Public Schools could suffer serious consequences. As a result, information security must be a critical part of the district's business environment.

ACCESS

Each user who is granted access to a computer system or systems, data, software, technology equipment, communication devices and computer outputs is responsible for maintaining the confidentiality of that information.

RESPONSIBILITY

All users shall use district equipment and technology in accordance with federal and state statutes and district policies.

Administrators and supervisors are responsible for monitoring compliance of employees under their direction.

PERSONAL USE OF INFORMATION SYSTEMS

A. The district is not liable for any loss of an employee's non-work related data.

B. Personal Use - All user activity is subject to logging and subsequent analysis. Users must not perform any activity while on district provided internet or on district owned devices that could damage the reputation of Union Public Schools. Unprofessional conduct could lead to disciplinary action. Incidental personal use of district information systems including the telephone is permissible as long as the usage does not interfere with job performance, does not deny other users access to the system resources, and does not incur any costs without permission by an administrator. Personal use of district information, such as a mailing list, requires the advance approval of the Superintendent or designee.

C. Testing Prohibition - Users must not test or attempt to compromise any information security mechanism unless specifically authorized to do so by the Executive Director of Technology. Unless specifically approved by the Executive Director of Technology, users must not possess or use software or other tools that are designed to compromise information security.

STEWARDSHIP FOR ALL ASSIGNED DEVICES

A. Security - It is the responsibility of the user to properly use and protect any portable computer, tablet, or other technology device. Great care and caution must be taken whenever a computer is loaned to a non-district employee for temporary access. Its screen should be password locked when turned on but not being used.

B. If a mobile device is lost, stolen, or compromised the user shall notify the IT Department and the employee's direct supervisor or the student's first hour teacher within the next business day. Any stolen device must be reported to the Technology Department accompanied by a completed police report.

C. Financial obligations may be issued to the student/guardian or employee if damage is determined to be the result of negligence.

D. Devices must be returned when requested. Employees must return devices prior to their last day of employment or earlier if requested. Students must return all personally assigned district devices no later than the last day of school or when requested by their school site.

E. Devices that leave district property are still subject to internet filtering/monitoring requirements the same as if the device was on district property.

F. Geolocation services may collect location data.

G. No software, configuration, or application shall be used to remotely activate any camera on a device. Webcams and other streaming cameras must only be activated by the end-user manually.

H. Devices must not be left unattended in any unsecure location. This includes, but not limited to, in a car overnight, on a table in a public accessible area, or on a school bus.

I. Data Encryption: Any data stored on a mobile device or mobile storage device, should be encrypted.

THIRD-PARTY ACCESS

A. Physically connecting to the Network

a. Any hard-wired connection for any outside agent, must be approved by the Technology department.

- b. ~~Outside agent's computer must meet minimum security thresholds.~~
 - c. ~~Prior to connecting to any network location, outside agent must contact the Technology department and provide a scope of work and time frame expectation.~~
 - B. ~~Wirelessly connecting to the Network~~
 - a. ~~Principal or site administrator must make the request to the Technology department.~~
 - b. ~~A user account will be created, with no email access, and the setup instructions will be emailed directly to the third party agent's personal email.~~
 - c. ~~All accounts expire at the end of the current semester and a request must be made to the Technology department to reestablish access.~~
 - C. ~~Third-party information system vendors must initiate in-bound connection when the applicable project manager determines that they have a legitimate business need. These privileges must be enabled only for the time period required to accomplish previously defined and approved tasks. Third-party vendor access that will last longer than one day must be approved by the IT Department. Vendor activity must be monitored while connected to a Union device.~~
 - D. ~~Unless the relevant information project manager has approved in advance, employees must not place anything other than district public information in a directory, on a server or in any other location where unknown parties could readily access it.~~
 - E. ~~As a condition of gaining access to the district computer network, every third party must secure its own connected system in a manner consistent with district requirements. Union Public Schools must reserve the right to audit the security measures in effect on third-party-connected systems to ensure security compliance. Union Public Schools also must reserve the right to immediately terminate network connections with all third-party systems not meeting such requirements.~~
 - F. ~~In the event of a breach or intrusion or otherwise unauthorized access to district-owned data stored on vendor equipment, vendor shall immediately notify the Executive Director of Technology to allow the proper compliant (SOX, PCI, HIPAA, FERPA) break notification process to commence.~~
 - G. ~~No third party vendors or contractors will receive a District provided email account with the exception of substitute positions.~~
 - H. ~~Third party vendors and contractors will be provided an Active Directory account to be able to access District provided computers as well as the wireless network where applicable. Accounts will only be active for current semester or the termination of their agreement/assignment, whichever is sooner. Principal, administrator, or building secretary must request reactivation.~~

INTELLECTUAL PROPERTY RIGHTS

- A. ~~Legal Ownership - With the exception of material clearly owned by third parties, Union Public Schools is the legal owner of all business information stored on or passing through its systems. Unless the Superintendent has signed a specific written agreement, all business-related information developed while a user is employed by the district is Union Public Schools' property.~~
- B. ~~Software - If a system that is used to process district information has been set up by the IT Department, users can rely on the fact that all software on this system is licensed and authorized. Questions about licensing must be directed to the IT Department which maintains documentation reflecting software licenses throughout the district. Making regular backups of software for contingency planning purposes is permissible. The IT Department must remove all unauthorized software from systems that are used to process district information.~~

DIGITAL SIGNATURES

Digital Signatures may be used where simple electronic signatures are acceptable and authorized for use. They may be permitted or required for any record or document where a signature is required by Federal law, Oklahoma law, or by Union Public Schools' policy unless a handwritten signature is explicitly required.

Adopted 6/10/96 _____

Revised 12/8/97

Revised 12/14/98

Revised 1/8/01

Revised 12/8/03

Revised 12/13/04
Revised 1/16/06
Revised 2/12/07
Revised 11/10/08
Revised 11/8/10
Revised 12/12/11
Revised 12/9/13
Revised 12/14/15
Revised 11/14/16
Revised 12/10/18
Revised 12/9/19
Revised 12/14/2020
Revised 12/13/21
Revised 6/13/22
Revised 12/12/22
Revised 12/11/23
Revised 12/9/24

- A. Applicability - This policy applies to all employees, contractors, consultants, temporaries and volunteers who use the internal network and/or the Internet with district computing or networking resources. All users are expected to be familiar with and fully comply with this policy. Violations of this policy can lead to disciplinary action up to and including termination.
- B. Internet Access - In order to receive Internet access privileges, an employee must have on file in the Human Resources Department a signed Internet Use Agreement.

RELIABILITY INFORMATION OBTAINED FROM THE INTERNET

- A. Information Reliability - All information ~~acquired~~ **obtained** from the Internet must be considered suspect until confirmed by separate information from another source. ~~Before using free Internet-supplied information for business decision-making purposes, employees should corroborate the information by consulting other sources.~~ **Employees should cross-reference information with reputable sources and be cautious of phishing, misinformation, or unverified content.**
- B. Software Downloading - Union Public Schools can automatically audit all software residing on any district-owned computer systems. Employees must not install software on the district-supplied computers without approval from the Executive Director of Technology or has been approved and posted to the "Approved Software List". When unapproved or unlicensed software is found, it will be removed from the district's computer system.
- C. ~~Spooing Users~~ **Phishing/Identity Verification** - Before employees use information obtained from the Internet or from e-mail, the identity of the individuals and organizations contacted should be confirmed. Identity confirmation is ideally performed through digital signatures or digital certificates, ~~but in cases where these are not available, other means such as letters on official stationery, third-party references and telephone conversations may be used.~~
- D. Electronic Mail Attachments - Employees should not open electronic mail attachments unless they were expected from a ~~trusted~~ **verified** sender.

INTELLECTUAL PROPERTY RIGHTS

Copyrights - When at work or when district computing or networking resources are employed, copying of software in a manner that is not consistent with the vendor's license is strictly forbidden. The reproduction, forwarding or in any other way republishing or redistributing words, graphics or other copyrighted materials must be done only with the permission of the author or owner. Employees must assume that all materials on the Internet are copyrighted unless specific notice states otherwise. When information from the Internet is integrated into internal reports or used for other purposes, all material must include an appropriate citation and specifics about the source of the information.

PERSONAL USE

- A. Personal Use - Employees shall not abuse Internet access. Games, news groups, social media, and other non-business activities must be performed on personal, not district time. Minimal use of district computing resources for these personal purposes is permissible. No Union Public Schools business activity is to be preempted by the personal use, and the usage ~~is not likely to~~ **must not** cause either a hostile working environment or a poor behavioral example. Employees must not employ the Internet or other internal information systems in such a way that the productivity of other employees is eroded. Union Public Schools computing resources must not be resold to other parties. Also, they shall not be used for running a personal commercial business during the employee's work day. No district computer shall be used for mining, acquiring, buying, selling, or trading in cryptocurrency.
- B. Offensive Web Sites - Union Public Schools is not responsible for the content that employees may encounter when they use the Internet. When and if users make a connection with websites containing objectionable content, they must promptly move to another site or terminate their session. Employees using Union Public Schools computers who discover they have connected with a website that contains sexually explicit, racist, sexist, violent or other potentially offensive material must immediately disconnect from that site.
- C. The user is responsible for all media, internet usage, downloads, file creation, file deletion, file sharing, file storage, and other actions that involve the use of the device.
- D. Blocking Sites and Content Types - The ability to connect with a specific website does not in itself imply that users of Union Public Schools systems are permitted to visit that site. The district may, at its discretion, restrict or block websites and the downloading of certain file types that are likely to cause network service degradation.

PRIVACY EXPECTATIONS

Users must have no expectation of privacy when using information systems provided by Union Public Schools. To manage systems and enforce security, the district may log, review and otherwise utilize any information stored on or passing through its systems. Union Public Schools may capture user activity such as websites visited. In order to make this clear to all computer users, the following message is displayed whenever employees log on to the Union

network from a Union computer:

This is a Union Public Schools (I-009) owned computer system. This computer system, including all related equipment, networks and network devices (specifically Internet access), is provided only for authorized use. Union Public Schools' computer systems are monitored for all lawful purposes, including ensuring that their use is authorized, for management of the system, to facilitate protection against unauthorized access and to verify security procedures, survivability and operational security. Monitoring includes active attacks by authorized Union Public Schools' entities to test or verify the security of this system. During monitoring, information may be examined, recorded, copied and used for authorized purposes. All information, including personal information, placed on or sent over this system may be monitored and become property of Union Public Schools. Use of this computer system, authorized or unauthorized, constitutes consent to monitoring of this system. Unauthorized use may lead to criminal prosecution. Evidence of unauthorized use collected during monitoring may be used for administrative, criminal or adverse action. Use of this system constitutes consent to monitoring for these purposes. This computer system and all related equipment, networks, and Internet access are the property of Union Public Schools (I-009) and are provided for authorized use only.

Use of this system constitutes consent to monitoring. Union Public Schools monitors its computer systems for lawful purposes, including verifying authorized use, managing system performance, protecting against unauthorized access, and ensuring operational security. Monitoring may include active security testing.

Information transmitted, received, or stored on this system may be examined, recorded, copied, or used for authorized purposes and may become the property of Union Public Schools. Unauthorized use may result in disciplinary action, criminal prosecution, or other legal or administrative consequences.

- A. No Default Protection - Employees using Union Public Schools information systems or the Internet must realize that their communications are not automatically protected from viewing by third parties. Unless encryption is used, employees should understand that any data including confidential or private information may be intercepted by third-party individuals or organizations.
- B. Management Review - At any time and without prior notice, Union Public Schools reserves the right to examine electronic mail messages, files on **personal District** computers, web browser cache files, web browser bookmarks, logs of websites visited, computer system configurations and other information stored on or passing through Union Public Schools computers.
- C. Logging - Union Public Schools logs all websites visited, files downloaded, time spent on the Internet and related information. The Superintendent **or designee** may request, from the **IT Department, Executive Director of Technology any** reports of such information on any employee in their area. The IT Department may also archive network access activity to files and directories for certain Federal compliances. Such logging could include username, date of access, and whether or not the user modified data.
- D. Junk Electronic Mail - Users must not use district computer systems for the transmission of unsolicited bulk electronic mail advertisements or commercial messages without the permission of the Superintendent or designee. These prohibited messages include a wide variety of unsolicited promotions and solicitations such as chain letters, pyramid schemes and direct marketing pitches. When employees receive unwanted and unsolicited internal electronic mail of this type, they should refrain from responding directly to the sender.
- E. Public WiFi - When connecting to any public WiFi (Hotel, Conference, etc.) there shall be no expectations of privacy.

PHYSICAL SECURITY

- A. In accordance with Federal law, no desktop phone shall be moved unless by an authorized employee of the Technology department. All phones are programmed to report the actual room number in case of a 911 or emergency call.
- B. No employee shall ever use a software-based phone or app based phone to call for emergency help. If emergency help is needed, the employee must use their personal cell phone or land line to request emergency help.

REPORTING SECURITY PROBLEMS

- A. Notification Process - If sensitive Union Public Schools information is lost, disclosed to unauthorized parties or suspected of either, the IT Department must be notified immediately. If any unauthorized use of Union Public Schools information systems has taken place or is suspected of taking place, the IT Department must be notified immediately.
- B. False Security Reports - Employees in receipt of information about system vulnerabilities must forward it to the IT Department, who then will determine what, if any, action is appropriate. Employees must not personally

redistribute system vulnerability information to other users.

- C. Testing Controls - Employees must not test or probe security mechanisms at either Union Public Schools or other Internet sites unless they have obtained written permission from the IT Department. The possession or the usage of tools for detecting information system vulnerabilities, or tools for compromising information security mechanisms, is prohibited without the advance permission of the IT Department.

MULTI-FACTOR AUTHENTICATION (MFA)

- A. Email Connectivity: All employees must authenticate through two different authentication processes prior to accessing email. All employees that wish to use Union Public Schools' email system will be required to:
 - a. Register a device or alternative contact to provide a secure method for the District or their services to contact the employee during the authentication (login) process, such as a cellphone that can receive texts, a District Specified app, or a landline phone;
 - b. When attempting to log into a Union Public School owned system protected by MFA, the system will "challenge" the employee by requesting a secret security code. This code will be provided through the secure method selected during registration or as a confirmation request in the MFA application.
- B. Remote Connectivity: All remote network access will be required to use MFA to authenticate and validate all users prior to remotely connecting to the district infrastructure. Remote connections include, but not limited to, any inbound VPN connection, remote screen sharing utility, ssh connection, telnet, or remote desktop protocol.
- C. Administrative access to local computers/servers: Any user that requires local administrative rights to a computer or server, will be required to contact the Technology Department to determine what extent they will need to use MFA to gain access to the local sources where applicable and feasible as determined by the Executive Director of Technology.
- D. Infrastructure Administrative Access: Prior to any employee gaining administrative access to the district's directory services, firewalls, routers, switches, access points, servers, or backup environment, the employee must contact the Technology department to ensure their account has access and that their account had been set to force MFA where applicable and feasible as determined by the Executive Director of Technology.

Adopted 12/13/04

Revised 1/16/06

Revised 2/12/07

Revised 12/10/07

Revised 12/12/11

Revised 12/9/13

Revised 12/14/15

Revised 12/11/17

Revised 12/9/19

Revised 12/14/2020

Revised 12/13/21

Revised 12/12/22

Revised 12/9/24

Proposed Revision 11/10/25

A large portion of Union Public Schools business is conducted with district-owned computers. Protection of district-owned computers and the information handled by these systems is an essential part of doing business at Union Public Schools. All district computer users are expected to comply with this policy.

CONFIGURATION CONTROL

- A. Changes To Application Software and Hardware - Union Public Schools has a self-service portal of approved software packages that users may run on their district-owned computers. Employees must not install other software packages on district-owned computers without obtaining advance permission from the IT Department. Employees must not permit automatic software installation routines to be run on district-owned computers unless these routines have been approved by the IT Department. Unapproved software may be removed without advance notice to the involved employee.
- B. Changes To Operating System Configuration - On district-supplied computer hardware, ~~employees~~ **users** must not change operating system configurations, upgrade existing operating systems or install new operating systems. If such changes are required, they must be performed by IT Department personnel except when an employee has been issued a device set up to allow that capability.
- C. Changes To Hardware - Computer equipment supplied by Union Public Schools must not be altered or added to in any way ~~without the prior knowledge of and authorization from the IT Department.~~

ACCESS CONTROL

- A. Choice Of Passwords - The user-chosen passwords employed by access control software packages and the keys employed by encryption packages must be in compliance with requirements set by the IT Department.
- B. Storage Of Passwords - Employees must maintain exclusive control of their personal passwords. They must not share them with others at any time. Passwords must not be stored in readable form in batch files, automatic logon scripts, software macros, **on a post-it note, word document, or digitally** ~~in computers~~ without access controls or in any other locations where unauthorized persons might discover them.
- C. Teacher Computer Use - Computers assigned to teachers shall not be used by students and should never be accessed while using teacher's credentials.
- D. USB Access - Teachers shall never insert any portable mass storage device into their computer that is not their own. This would include never downloading any files or uploading any files to a student's portable storage device.

BACKUP

- A. Device Backup -
 - a. All sensitive, valuable or critical information resident on the district computer systems must be periodically backed up. Such backup processes should be performed weekly;
 - b. The end user is ultimately responsible to ensure the accuracy of the backup.
- B. Copyright Protection - Making unauthorized copies of licensed and copyrighted software, even if for "evaluation" purposes, is forbidden. Union Public Schools permits reproduction of copyrighted materials only to the extent legally considered fair use or with the permission of the author or owner. If employees have any questions about the copyright laws as they pertain to software, they should contact the IT Department. Unless they receive information to the contrary, employees must assume that software and other materials are copyrighted.

NETWORKING

- A. Modems or wireless access points are not permitted without approval from the IT Department.
- B. Downloading Sensitive Information - Sensitive district information may be downloaded ~~from a multi-user system~~ to a district-owned computer only if a clear business need exists, adequate controls to protect the information are currently installed on the involved district-owned computer and advance permission from the information owner has been obtained. This policy is not intended to cover electronic mail or memos, but does apply to databases, master files and other information stored on minicomputers, servers and other multi-user machines. This applies regardless of the media on which information is stored, the locations where the information is stored, the systems technology used to process the information, the people who handle it or the processes by which information is handled.
- C. Installation Of Communications Lines - Employees and vendors must not make arrangements for or actually complete the installation of voice or data lines with any carrier if they have not obtained approval from the Executive Director of Technology.
- D. Establishing Networks - Employees must not establish local-area networks, wireless networks, or modem connections to existing networks or other multi-user systems for communicating information without the specific approval of the Executive Director of Technology.
- E. Remote Desktop or Terminal Services - Remote desktop or terminal services to ~~home or~~ out-of-district computers must be approved by the Executive Director of Technology.

PHYSICAL SECURITY

- A. Lending District-Owned Technology To Others - Users should never lend a personally assigned district-owned computer to a non-district employee.
- B. Custodians For Equipment - The primary user of a district-owned computer is considered a Custodian for the equipment. If the equipment has been damaged, lost, stolen, borrowed or is otherwise unavailable for normal business activities, a Custodian must promptly inform his/her supervisor. With the exception of portable machines, district-owned computer equipment must not be moved or relocated without the knowledge and approval of the supervisor.
- C. Use of Personal Equipment - The Technology Department shall not provide any support for personal devices including driver installation.
- D. Positioning Display Screens - Care must be taken to position keyboards or screens so that unauthorized persons cannot readily see confidential information, employees enter passwords, encryption keys and other security-related parameters.
- E. Locking Sensitive Information - When not being used or when not in a clearly visible and attended area, computers must be locked or the user logged off.
- F. ~~Environmental Considerations - All district-owned computers in district offices should use surge suppressors. Those district-owned computers running critical applications should use uninterruptible power systems approved by the IT Department.~~

MANAGEMENT

- A. Rights To Programs Developed - Without a specific written exception, all computer programs and documentation generated or provided by employees for the benefit of the district are the property of Union Public Schools. All other material developed by district employees using district-owned computers is considered the property of Union Public Schools. This material includes patents, copyrights and trademarks.
- B. Browsing - Employees must not browse through district computer systems or networks. Steps taken by employees to legitimately locate information needed to perform their job are not considered browsing.
- C. Tools To Compromise Systems Security - Unless specifically authorized by the Executive Director of Technology, district employees must not acquire, possess, trade or use hardware or software tools that could be employed to evaluate or compromise information systems security. Examples of such tools include those that defeat software copy protection, discover secret passwords, identify security vulnerabilities or decrypt encrypted files.
- D. Reporting Problems - Users must promptly report all information security alerts, warnings and suspected vulnerabilities to the IT Department. Users must not use district systems to forward such information to other users, whether the other users are internal or external to Union Public Schools.

Adopted 12/13/04

Revised 1/16/06

Revised 2/12/07

Revised 12/10/07

Revised 1/18/10

Revised 11/8/10

Revised 12/12/11

Revised 12/10/12

Revised 12/9/13

Revised 12/14/15

Revised 12/9/19

Revised 12/14/2020

Revised 12/12/22

Revised 12/11/23

Revised 12/9/24

Proposed Revision 11/10/25

Passwords are a critical part of information and network security. Passwords serve to protect user accounts, but a poorly chosen password, if compromised, could put the entire network at risk. As a result, all employees of Union Public Schools are required to take appropriate steps to ensure that they create strong, secure passwords and keep them safeguarded at all times.

SCOPE

This policy applies to all employees of the district who have or are responsible for a computer account or any form of access that supports or requires a password on any system that resides at any district facility, has access to the Union Public Schools network or stores any non-public district information.

GENERAL

A. A password must not repeat within the last six passwords.

B. Password must not match any pattern of the previous password.

C. Passwords cannot contain username, employee ID, first name, nor the last name.

~~C,D~~ Passwords must contain at least fifteen (15) characters.

~~D,E~~ Passwords must contain at least ~~one (1) uppercase letter (e.g., N)~~ **three (3) of the following parameters:**

1. Passwords must contain at least one (1) uppercase letter (e.g., N)

2. One (1) lowercase letter (e.g., t).

3. Passwords must contain at least one (1) numerical character (e.g., 5).

4. Password must contain at least one special character.

~~E:~~ ~~One (1) lowercase letter (e.g., t):~~

~~F:~~ ~~Passwords must contain at least one (1) numerical character (e.g., 5):~~

~~G,F~~ Passwords must be at least 1 day old prior to changing password without involvement from the Technology department.

G. User accounts configured with mail access must change password at least once every 365 days.

PASSWORD CONSTRUCTION GUIDELINES

A. For security purposes, it is strongly recommended that passwords not be based on well-known or easily accessible personal information or that of the user's friends, family members or pets. Personal information includes, but is not limited to, log on I.D., name, birthday, address, phone number or social security number.

PASSWORD PROTECTION GUIDELINES

A. Passwords must be treated as confidential information. No employee is to give, tell or hint at their password to another person, including IT staff, administrators, superiors, secretaries, assistants, other co-workers, friends or family members under any circumstances.

B. If someone demands your password, refer them to this policy or to the IT Department.

C. Passwords are not to be transmitted electronically over the unprotected Internet, such as via e-mail.

D. No employee is to keep an unsecured written record of passwords, either on paper or in an electronic file.

E. Passwords used to gain access to district systems should not be used as passwords to access non-district accounts or information.

F. The password used for Union Public Schools access must be unique and not shared with any other system, website, cloud service, or app.

G. If an employee either knows or suspects that his/her password has been compromised, it must be reported to the IT Department and the password changed immediately.

H. The IT Department may attempt to crack or guess users' passwords as part of its ongoing security vulnerability auditing process. If a password is cracked or guessed during one of these audits, the user will be required to change the password immediately.

I. Only an employee's supervisor, building secretary, or other administrator can request that an employee's password be reset.

J. Passwords shall never be written on a whiteboard, interactive flat panel, chalkboard, or any other means.

MOBILE DEVICE PIN/PASSWORD CONFIGURATION STANDARDS

- A. When using a mobile device, such as a smart phone or tablet, to access, manipulate, or generate district-owned data that contains any personally identifiable information, the device must require authentication prior to accessing the mobile device.
- B. PINS/Passwords must be a minimum of 6 characters, employ facial recognition authentication, fingerprint reader, or complex pattern unlock feature.

ENFORCEMENT

Any employee who is found to have violated this policy may be subject to disciplinary action, up to and including termination of employment.

Adopted 1/16/06

Revised 1/18/10

Revised 12/12/11

Revised 12/11/17

Revised 12/10/18

Revised 12/14/20

Revised 12/12/22

Revised 12/11/23

Proposed Revision 11/10/25

As a productivity tool, Union Public Schools encourages the business use of electronic communications systems, notably the Internet, Employee Network and electronic mail. Unless third parties have clearly noted copyrights or some other rights on the messages handled by these electronic communications systems, all messages generated on or handled by district electronic communications systems are considered to be the property of Union Public Schools.

- A. **Authorized Usage** - Union Public Schools electronic communications systems are to be used for official district communications. Incidental personal use is permissible as long as it does not consume more than a trivial amount of system resources, does not interfere with employee productivity and does not preempt any business activity. Union Public Schools electronic communication systems must not be used for unauthorized fund-raising campaigns, political advocacy efforts, religious efforts, private business activities. News feeds, e-mail mailing lists, push data updates and other mechanisms for receiving information over the Internet must be restricted to material that is clearly related to both district business and the professional duties of the receiving employees. Employees are reminded that the use of district information resources must never create the appearance or the reality of inappropriate use.
- B. **Site/Districtwide Emails** - Sending email messages to all employees at a school is limited to the Superintendent, Associate Superintendent, the Superintendent's administrative assistant, the principal, the site secretary or anyone authorized by the Superintendent. Sending messages to all employees in the district is limited to the Superintendent, Associate Superintendent, Assistant Superintendents, the CFO, the Chief Communications Officer, and the Superintendent's administrative assistant. The Executive Director of IT or designee is permitted to send out an e-mail message to all employees if a technology-related issue requires staff to be immediately notified of an imminent technology issue or by direction of the Superintendent.
- C. **Default Privileges** - Electronic communication systems must be established and maintained such that only the privileges necessary to perform a job are granted to an employee. For example, when an employee's relationship with the district comes to an end, all of the employee's privileges on district communication systems may be disabled. Employees should not exceed or attempt to exceed the scope of access granted them.
- D. **User Identity for District Business** - Misrepresenting, obscuring, suppressing or replacing another user's identity on an electronic communications system is forbidden. The user name, electronic mail address, organizational affiliation and related information included with electronic messages or postings must reflect the actual originator of the messages or postings. Electronic mail signatures indicating name, phone number, job title, company affiliation, address and other particulars are strongly recommended for all electronic mail messages. Digital certificates are also recommended for electronic e-mail.
- E. **Use of Encryption Programs** - Employees are reminded that district electronic communications systems are not encrypted by default. If sensitive information that is confidential or secret must be sent by electronic communications systems, an encryption process approved by the IT Department should be employed. These encryption systems must protect the sensitive information from end to end. They must not involve decryption of the message content before the message reaches its intended final destination. Mobile computers, notebook computers, portable computers, personal digital assistants and similar computers that store Union Public Schools sensitive information must consistently employ a hard-to-guess password. ~~Employees must not use encryption for any electronic communications system unless a backup key or a key escrow system has been established with the cooperation of the IT Department.~~
- F. **Respecting Intellectual Property Rights** - Although the Internet is an information communications environment, the laws for copyrights, patents and trademarks apply. Employees using district electronic mail systems must repost or reproduce material only after obtaining permission from the source; quote material from other sources only if these other sources are properly identified; and reveal internal district information on the Internet only if the information has been officially approved for public release. All information acquired from the Internet must be considered suspect until confirmed by another source.
- G. **Respecting Privacy Rights** - Except as otherwise specifically approved by the IT Department, employees must not intercept or disclose, or assist in intercepting or disclosing, electronic communications. ~~Union Public Schools also is responsible for operating, maintaining and protecting its electronic communications networks.~~ To accomplish these objectives, it is occasionally necessary to intercept or disclose, or assist in intercepting or disclosing, electronic communications. To meet these objectives, The district may employ content monitoring systems, message logging systems and other electronic system management tools. By making use of district systems, users consent to permit all information they store on district systems to be divulged to law enforcement at the discretion of the Union Public School district management.
- H. **No Guaranteed Message Privacy** - Union Public Schools cannot guarantee that electronic communications will be private. Employees must be aware that electronic communications can, depending on the technology, be forwarded, intercepted, printed and stored by others. Electronic communications can be accessed by people other than the intended recipients in accordance with this policy. ~~Because messages can be stored in backups, electronic communications actually may be retrievable when a traditional paper letter would have been discarded or destroyed.~~
- I. **No Service Guarantees** - The district makes no guarantees of any kind, whether expressed or implied, for the service it is providing. The district will not be responsible for any damage suffered. This includes loss of data

resulting from delays, non-deliveries or service interruptions caused by negligence, errors or omissions.

- J Contents of Messages - Employees must not use profanity, obscenities, or derogatory remarks in electronic mail messages discussing employees, students, parents or others. Such remarks may create legal problems such as libel and defamation of character. Employees must concentrate on business matters in district electronic communications. As a matter of standard business practice, all Union Public School electronic communications must be consistent with conventional standards of ethical and polite conduct. Political and/or religious messages and quotes are not appropriate for district communications. Transmission of any material in violation of any federal or state regulation is prohibited.
- K Statistical Data - Consistent with generally accepted business practice, Union Public Schools collects statistical data about its electronic communication systems. Using such information, technical support personnel monitor the use of electronic communications to ensure the ongoing availability, reliability and security of these systems. Union Public Schools employs computer systems that analyze these types of statistical information to detect unauthorized usage, toll fraud, denial of service attacks and other problems.
- L Incidental Disclosure - Technical support personnel must not review the content of an individual employee's communications out of personal curiosity. Support may access personal email accounts only with permission from the end user. Advance approval by the Superintendent is required prior to remotely accessing any user's personal email account without the end user's approval.
- M Addendum on Outbound Electronic Mail - E-mail messages with sensitive information or information that should not be shared beyond the original receivers of the e-mail should have a disclaimer on the e-mail. The standard disclaimer is:

CONFIDENTIALITY NOTICE: If you have received this e-mail in error, please immediately notify the sender by e-mail address shown. This e-mail transmission may contain confidential information in its message or in an attachment. The information is intended only for the use of the individual(s) or entity to whom it is addressed. Any inappropriate disclosure, distribution, copying or use of the information by others is strictly prohibited. Please delete it from your files if you are not the intended recipient. Thank you for your compliance.
- N Handling Technology Alerts About Security - Users must promptly report all information security alerts, warnings, and reported vulnerabilities to the IT Department. IT is the only organizational unit authorized to determine appropriate action in response to such notices. Users must not utilize Union Public Schools systems to forward these notices to other users, whether the other users are internal or external to Union Public Schools. Users must promptly report all suspected security vulnerabilities or problems that they notice to the IT Department.
- O Purging Electronic Messages - ~~Messages no longer needed for business purposes may be periodically purged by users from their personal electronic message storage areas~~ **Any email stored on the server/cloud will be purged after the email creation date exceeds seven years.**
- P Harassing or Offensive Materials - Union Public Schools computer and communications systems are not intended to be used for, and must not be used for the exercise of the employees' right to free speech. These systems must not be used as an open forum to discuss Union Public Schools organizational changes or business policy matters. Sexual, ethnic, and racial harassment, including unwanted electronic mail is strictly prohibited. Employees who receive offensive unsolicited material from inside or outside sources must not forward or redistribute to either internal or external parties. If an employee wishes to report a harassing or offensive electronic communication Human Resources Department must be notified.
- Q. The Human Resources Department should be notified immediately in the case of a sexual harassment message. ~~Union Public Schools retains the right to remove from its information systems any material it views as offensive or potentially illegal.~~
- R Use At Your Own Risk - Employees access the Internet with district facilities at their own risk. Union Public Schools is not responsible for material viewed, downloaded or received by users through the Internet. Electronic mail systems may deliver unsolicited messages that contain offensive content.
- S In order to comply with applicable state and federal laws, Union Public Schools employs a mechanism to automatically archive all e-mail messages sent internally and externally through the district e-mail system.
- T Sharing and Forwarding - When electronic mail accounts are set up for specific individuals, they must not be shared. A generic electronic mail account may be set up at the request of an administrator in order for multiple users to access it for a specific business purpose. Generic accounts should not be used for personal information. Notices can be established that will automatically inform correspondents that the recipient will not be responding for a certain period of time. Upon departure from Union Public Schools, a user's electronic mail account will be immediately disabled upon termination and deleted after thirty (30 days).
- U Users shall not directly click any link within an e-mail. All URLs/links embedded in an email must be copied

and pasted into a browser prior to accessing the website.

- V. All emails are archived for seven years. After seven years, all messages that are not marked for permanent storage due to a court order are automatically purged from central archive. Any email that must be retained longer than seven years is the responsibility of employee to personally archive those messages.

Adopted 12/13/04

Revised 2/12/07

Revised 11/10/08

Revised 1/18/10

Revised 11/8/10

Revised 12/9/13

Revised 12/8/14

Revised 12/14/15

Revised 12/11/17

Revised 12/14/2020

Revised 12/12/22

Revised 12/11/23

Revised 12/9/24

Proposed Revision 11/10/25

This policy shall govern the purchase, rental or leasing of all goods, equipment, software, construction, services, and real property for the district.

DEFINITIONS

- A. Adequate Number - Two (2) or more offers from responsible offerors.
- B. Best Value - An acquisition based on clearly defined quantifiable evaluation criteria ~~which may include, but not be limited to: unit pricing; total acquisition cost; cost of ownership; cost of distribution; form, fit and function of products; innovation; warranties and guarantees; supplier qualifications; reliability and past performance; quality of goods; transition costs; opportunity cost and other quantifiable criteria~~ deemed to be in the best interest of the district.
- C. Emergency - A sudden unexpected or unforeseen occurrence or condition that requires the purchase and procurement of goods or services necessary ~~to protect public health, safety, life or property of the district or its students, employees and patrons, or necessary~~ to avoid the interruption of critical school business and operations.
- ~~D. Encumbrance Clerk/Assistant Encumbrance Clerks - The employees designated by the Board of Education to oversee all encumbrances and to charge each encumbrance appropriately and in accordance with Oklahoma legal requirements.~~
- ~~E. Goods - Personal property, materials, movable property, thing or things for sale or rent (e.g., furniture, equipment, supplies, uniforms, etc.)~~
- ~~F.D.~~ Lowest and Best - An award method based on lowest total purchase price, quality and reliability, best delivery offer, and other factors as identified in the solicitation.
- ~~G. Independent Contractor - An individual who provides goods and/or services in a manner defined by the Internal Revenue Service regulations and the Oklahoma State Department of Education Independent Contractor guidelines as amended. The independent contractor provides the same goods and/or services to at least two or more other entities.~~
- ~~H. Minor Maintenance and Repair - Replacement or repair of existing facility infrastructure or equipment necessary to restore such to a temporary or permanent operational function, e.g. repair a broken water line.~~
- ~~I. Professional and Technical Contracted Services - Those services defined as outsourced services provided by professionals in their field.~~
- ~~J.E.~~ Purchase Order (PO) - The district's printed or electronic document issued to a supplier formalizing all the terms and conditions of a proposed transaction, ~~such as description of the requested items, delivery schedule, and terms of payment. If the Board of Education fails to approve a purchase order, it shall be null and void. The purchase order serves as the contract and authorizes the employee to place an order with the supplier. Purchase orders must be issued prior to ordering goods or services.~~
- ~~K.F.~~ Purchase Order Terms - Unless otherwise defined in writing by separate contract between the district and the supplier, the district's purchase order terms, as referenced on the purchase order and posted on the Union website, shall govern the purchase of goods and services.
- ~~L.G.~~ Purchasing Cooperative - An association of entities or alliances working together to provide leverage in achieving best value and/or the best terms in contracts awarded.
- ~~M.H.~~ P-Card/Credit Card - Purchase/Procurement or district-owned credit card program approved by the Board of Education.
- ~~N. Real Property - Land and its permanently affixed buildings or structures; any property which is not personal property.~~
- ~~O.I.~~ Requisition - The printed or electronically generated document used to request the encumbrance of funds and the issuance of a purchase order.
- ~~P. Software & Services - Computerized programs, operating systems, licenses, and information used by computer systems, software as a service (SaaS), cloud-based computing systems, web-based systems, electronic books and media, and professional services necessary to implement and integrate systems.~~
- ~~Q.J.~~ Sole Source Procurement - A non-competitive method of procurement for the purchase of unique goods or services from one supplier, whereby said supplier is the only source. ~~Sole source does not necessarily include~~

~~proprietary goods or equipment.~~

~~R.—Source Selection—The sourcing method used to select a supplier of goods or services; request for written quotations, invitation for bids, request for proposals, [e.g., written quotations (Request for Quotation), sealed bids (Invitation for Bids), proposals (Request for Proposal or Request for Information), etc.]~~

SK. Supplier - A person or entity that provides goods and/or services.

GENERAL PROVISIONS

The Board of Education authorizes the Superintendent and/or Chief Financial Officer or designees to establish purchasing and procurement procedures and practices consistent with this policy, federal laws, Oklahoma law and generally accepted governmental purchasing practices.

A. Purchase Orders and Requisitions:

General: All purchases shall be made with the use of a purchase order issued prior to the ordering of goods or services. All purchase orders are contingent upon the availability of funding, submission and approval of the requisition, and approval by the Board of Education. The Board authorizes the Superintendent, Chief Financial Officer and the Director of Accounting (encumbrance clerk) or designee to issue purchase orders, for less than \$100,000 without prior Board approval.

The Board authorizes the Encumbrance Clerk and/or designee to increase blanket purchase orders for utilities and/or freight as necessary to pay invoices and increase non-blanket purchase orders by up to fifteen percent (15%) to cover other transaction changes or pricing adjustments.

Any agenda item(s) approved by the Board at a regular or special Board meeting constitutes approval by the Board to encumber the funds, issue the purchase order, and make appropriate payments.

Credit Card/P-Card: Credit card and P-Card purchases may be permitted provided an encumbrance is in place to the supplier **or credit card supplier** to cover the credit card or P-Card transaction.

Public Improvement/Construction Projects of \$100,000 or more: Public improvement/construction projects, subject to the Oklahoma Competitive Bidding Act of 1974 of \$100,000 or more must be awarded and approved by the Board of Education as a separate agenda item prior to the release of a purchase order and contract.

All acquisitions or encumbrance of funds to a supplier/contractor of \$100,000 or more must be approved by the Board of Education as a separate agenda item prior to the issuance of a purchase order. Board approval of the purchase constitutes approval of the associated purchase order and payments.

Purchase orders, that would otherwise be issued to a single supplier as a single procurement or project, shall not be split to avoid bidding and quotation and/or Board approval requirements.

Blanket Purchase Orders: All blanket purchase orders of \$100,000 or more must be approved by the Board of Education as a **separate business** agenda item prior to the release of the blanket purchase order.

Transactions against a blanket purchase order shall not be permitted until the blanket purchase has been submitted to the Board of Education for approval.

B. Emergency Purchases and Emergency Purchase Orders:

In the event of emergency situations the Superintendent, Chief Financial Officer, Director of Accounting, or designee may authorize the issuance of emergency purchase orders. Emergency purchase orders shall not be issued out of the bond funds.

The Board of Education authorizes the Superintendent to declare an emergency and waive the notice and bid requirements of the Oklahoma Competitive Bidding Act of 1974 without Board approval for emergencies that are less than \$150,000.

C. Travel Reimbursement:

All travel will be approved and paid in accordance with district travel policy #3200, state and federal laws, and IRS guidelines. Please refer to Policy #3200 - Travel Expense Approval, Documentation, and Reimbursement.

D. Federal Uniform Guidance Requirements:

As a non-federal entity, the district will follow this purchasing and procurement policy and the written procedures and requirements of the district's federal Uniform Guidance Procurement Plan & Procedures as amended and approved.

Where the district's policies, requirements and procedures are more restrictive than the federal requirements,

the district's policies, requirements, and procedures shall be followed for the use and expenditure of all federal funds.

CONTRACTS

A. General:

No employee of the district shall enter into any financial contract or agreement (verbal or written), on behalf of the district, without the prior approval of the Board of Education. The Board may, upon approval of any encumbrance, purchase order and all adjoining contract documents, authorize an administrator(s) of the district to sign said contract documents on behalf of the Board and authorize issuance and payment of purchase order.

All school picture and yearbook contracts shall be approved by the Board of Education on an annual basis prior to signing of any contract.

B. Federal **and Non-Federal** Contracts:

Conflict of Interest - No employee, officer, **or agent, or board member** of the district may participate in the selection, award, or administration of a contract supported by a federal award **or non-federal funding** if he or she has a real or apparent conflict of interest. Such a conflict of interest would arise when the employee, officer, **or agent, board member or** any member of his or her immediate family, his or her partner, or an organization which employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm considered for a contract. See also Board Policy #4057.

C. Student Activity Fund Contracts:

Duly authorized student activity fund custodians may be permitted to execute Board-approved activity fund related contracts and agreements after all of the following conditions have been met:

- The Board has approved the contract or agreement and authorized the Activity Fund custodian to sign the contract.
- The associated encumbrance and purchase order(s) have been issued.

D. Independent Contractors:

The Board of Education may, upon approval of any encumbrance, purchase order, and all accompanying contract documents, procure the services of an individual who is deemed to be an independent contractor as defined by the IRS regulations and Oklahoma State Department of Education guidelines.

As with any other supplier, an independent contractor will be required to complete a supplier registration form and IRS form W-9. The district reserves the right to issue a 1099 to any supplier regardless of the total amount of the goods and/or services provided by the supplier. The independent contractor may be required to provide proof of workers compensation and liability insurance and must agree to the terms and conditions of the district's official purchase order.

BIDDING AND QUOTATION REQUIREMENTS

A. General:

The solicitation for bids, proposals and quotations shall be conducted in accordance with the provisions of this policy **,the federal Uniform Guidance Procurement Plan and Procedures,** and district purchasing procedures as approved by the Superintendent or Chief Financial Officer. Procurement transactions must be conducted in a manner that provides for full and open competition.

B. Methods of Procurement:

~~Unless otherwise exempted herein for non-federal procurements, the procurement thresholds shall apply to all purchases.~~ These procurement thresholds shall apply to the total amount of a requisition.

Sourcing Methods

Description	District's Threshold	Sourcing Requirements
Micro-Purchases	\$0 - \$10,000	Informal price quotes recommended
Small Dollar Purchases		
• Non-federal	\$10,000.01 to \$100,000	Adequate number of written quotes (Request for Quotation)
• Federal	\$10,000.01 to \$250,000	

Competitive Sealed Bids ¹ and Proposals ²		
• Non-federal	\$100,000.01 and up	Adequate number of sealed bids or proposals (IFB or RFP)
• Federal	\$250,000.01 and up	
Non-Competitive Proposals ³	\$10,000.01 and up	Sole Source
Public Improvement/Construction Projects ⁴	\$5,001 to \$100,000.	Use Small Dollar Method
Public Improvement/Construction Projects ⁴	\$100,000.01+	Competitive Sealed Bids

¹The sealed bid method of procurement shall be used for all competitive bidding of construction and maintenance projects (public improvements), ~~school bus purchases~~, and federal and non-federal program procurements for the threshold amounts stated. Sealed bid solicitations shall be publicly advertised, when required by statute or regulation, opened publicly **unless otherwise referenced in the solicitation**, and awarded in accordance with federal or state requirements, e.g., lowest responsive and responsible bidder (construction and federal programs) or lowest and best bid (school buses & non-federal).

²The competitive sealed proposal method shall be used when the conditions for the use of competitive sealed bid method are not appropriate or practicable. Competitive sealed proposals, usually solicited through the use of a Request for Proposal (RFP), may be used for soliciting the procurement of services, software, and where other factors critical to the procurement, use, product(s), and service is necessary. Competitive sealed proposals may be awarded to the bidder whose proposal is most advantageous to the program or project with price and other factors considered. Federal program procurements must be awarded in accordance with federal regulations and the District's **federal** Uniform Guidance Procurement Plan & Procedures.

³Sole source procurements for federal programs must be processed and awarded in accordance with the District's **federal** Uniform Guidance Procurement Plan and Procedures.

⁴Public improvement and construction projects, including minor maintenance and minor repair work to District property, and the selection of construction management and consultants firms shall be sourced and selected in accordance with the State **Consultants Constitution**, O.S. 61 § 62-65; Fair and Open Competition in Government Construction Act, O.S. 61 § 81-86; Public Competitive Bidding Act of 1974, O.S. 61 § 101-139; the Public Construction Management Act for Political Subdivisions, O.S. 61 § 215-220; the Fair and Open Competition in Governmental Construction Act, O.S. 61 § 81-86 and the Fair Pay for Construction Act, O.S. 61 § 221-227, as amended. Construction management trade contracts or subcontracts exceeding \$50,000 shall be let and awarded to the lowest responsible bidder, by open competition after solicitation for sealed bids. Minor maintenance and minor repairs that are less than \$25,000 may be negotiated with a qualified contractor without obtaining an adequate number of quotes.

The Director of Purchasing or designee may audit any or all requests for purchase requiring quotes or bids. Bids, quotes, and related documents not submitted with the requisition must be maintained by the school site or department for a minimum of two (2) years after the purchase. If purchased with federal funds, the documentation shall be kept for three (3) years after the final payment for the goods or services has been received.

C. Sealed Bid Requirements:

Formal sealed bids shall have a specific bid opening date and time. Bidders shall have the right to attend the public bid opening. At least two administrators or designees from different departments must be present during the bid opening. All sealed bids will be opened at the designated time and read aloud, if bidders are present.

The Board of Education authorizes the Director of Purchasing or designee to use an e-Procurement solution for soliciting quotes, bids and proposals. **Use of an e-procurement solution may eliminate public bid openings if referenced in the formal solicitation.**

D. Waiver of Bids and Quotes:

Where an emergency purchase (see definitions) is necessary, the Director of Purchasing or Director of Accounting may waive the quote requirements for all purchases of less than \$25,000. Emergency purchases over \$25,000 shall require waiver approval of the Superintendent or Chief Financial Officer.

A reason for the emergency waiver shall be recorded with the requisition.

Emergency purchases and contracts exceeding \$150,000 for the repair, maintenance, and remodeling of buildings and facilities, subject to the Oklahoma Competitive Bidding Act of 1974 (the Act), shall require declaration of emergency with bidding waiver and approval by the Board of Education in accordance with the Act.

E. Solicitation Award:

The district reserves the right to reject any or all bids, quotes and proposals, and to waive any bid informalities, technicalities, or irregularities.

Sealed bids for all federal programs and public improvement and construction projects shall be awarded to the lowest responsive and responsible bidder, as determined by the district.

Non-federal program and non-public improvement/construction acquisitions may be awarded to the lowest and best bidder.

Where it serves the district's best interest to award based on "best value," the district may award a written quote, sealed bid, or a proposal on a "best value" basis provided that the award is based on clearly defined evaluation criteria.

Requests for Proposals and Requests for Quotes may be awarded to the bidder whose proposal or quote is most advantageous to the district with price and other factors considered.

School bus bids shall be awarded to the lowest and best bidder.

F. Bid Protests:

Bid protests must be submitted in accordance with the Bid Protest Procedures located on the Union website.

BID EXEMPTIONS

A. General:

Except where competitive sourcing is required by federal and state law or regulation, the following bidding exemptions shall apply to all non-federal fund/program procurements. If a bidding exemption under the federal uniform guidance rules exists, the exemptions stated herein may be used. Bid exemptions may be used for federal program acquisition within the micro purchase thresholds.

School and department personnel must use prudent and ethical procurement practices. Although the following goods and services are exempt from methods of competitive sourcing, every effort should be made to obtain the best quality goods and services at the lowest price or cost from a responsible supplier:

Regardless of these bidding and sourcing exemptions, all purchases over \$100,000 must still be approved by the Board of Education prior to issuance of a purchase order.

B. Bidding exemptions:

- Contracted professional [services](#) and technical services.
- Equipment maintenance services (~~e.g., copier maintenance services, software maintenance, hardware maintenance, etc.~~).
- Travel services (~~airfare, hotel accommodations, registrations, etc.~~)
- Goods **and services** purchased for student activity fund raisers and goods purchased by and/or provided to staff and/or students from activity funds; ~~disc jockey services and equipment rentals for graduation, prom, dances and other student social activities; unique and custom decorations purchased from student activity funds and used for student events; class and spirit memorabilia items purchased for or by students and/or adults through the activity funds. Although bidding and/or proposals are not required for selection of yearbook and school picture suppliers annually, the district may require new proposals every three to five years.~~
- Goods purchased for resale.
- Standardized curriculum materials and related supplies, textbooks, e-books, student workbooks, library/media books, maps and globes, and educational and training media.
- Utility services.
- Software and software subscription renewals.
- Training classes.
- Equipment, [service](#) and vehicle rentals.
- Unique custom artistry work, graphic design service, custom set and prop design and construction, and customized wraps.
- Catering.
- Repairs to damaged vehicles, buses, trucks and trailers, e.g., body and framework. Where diagnostic

services are necessary to determine the repair, e.g. disassembly is required, additional price comparisons or quotes for repairs under the Small Dollar threshold may be waived by the Chief Financial Officer, Director of Purchasing, Director of Accounting or their designee.

- Replacement repair parts purchased from the original equipment manufacturer (OEM) or OEM supplier when said supplier is the only manufacturer's authorized supplier within the manufacturer's designated sales territory for the Tulsa market.
- Used goods.

C. Standardization Programs:

If standardization of equipment, furniture, materials or software has been implemented, schools and departments may make supplemental purchases without using one of the source selection methods, provided the price remains reasonable, and the procurement does not violate other federal or state bidding requirements. Price comparisons for similar or like products may be required.

The initial purchase of standardized furniture and equipment should be procured utilizing one of the required bidding/quotation methods defined in this policy; however, a cooperative contract may be used in lieu of district sourcing.

Standardization programs and the purchase of standardized equipment, furniture, materials and software is subject to review and approval of the District's Purchasing Department.

D. Sole-Source Selections:

Except as prohibited by federal Uniform Guidance requirements, sole-source procurements may be exempt from bidding provided that said procurements meet the following criteria:

- The goods or services are unique to one manufacturer/supplier and no other similar (equal in function, performance) or like goods or services are available from another supplier;
- The manufacturer distributes it directly or has limited distribution to a single distributor;
- The manufacturer (not distributor) or service provider submits a written letter on company letterhead stating why the goods or services are unique to the company and that distribution is limited to the company as the sole distributor. (This letter must be attached to the requisition.)
- Where compatibility of equipment, accessories or replacement parts are of paramount consideration or where service work on the original equipment must be performed by the manufacturer's designated territory or assigned representative. Written documentation of such from the manufacturer should be included with the requisition.

Sole source procurements are subject to the approval of the District's Purchasing Department.

E. State and Local Contracts:

The Board of Education authorizes the use of Oklahoma State Contracts in lieu of using District sourcing methods. Furthermore, when it is in the district's best interest, the district may purchase from other public contracts, cooperative purchasing alliances, or special pricing offers awarded to or made available to municipalities, public schools, other political subdivisions of the State, the Department of Corrections or other governmental entities of the United States. For acquisitions above the competitive sealed bid/proposal threshold, permission to use a state contract or purchasing cooperative must be obtained from the Director of Purchasing or Chief Financial Officer before requesting a quote from the supplier and submitting a requisition for the acquisition.

F. Procurement Cards:

The Board of Education authorizes the use of a procurement/purchasing card program. Prior to the implementation of the procurement card program, the Superintendent or Chief Financial Officer shall adopt written procedures, limits and controls for the issuance and use of procurement cards.

No employee of the district shall authorize the use of or use any credit card which is not part of the purchasing card program or which will in any manner obligate the district. Where the purchasing card program is not practicable for use, the Superintendent or Chief Financial Officer may authorize the use or issuance of other specific types of credit cards on a limited basis with prior approval. The procedures, limits and controls for the purchasing card program shall apply toward all other specific credit cards.

FOOD PROCUREMENT

A. Child Nutrition:

Child Nutrition purchases shall be made in accordance with USDA, Oklahoma State Department of Education Child Nutrition Procurement Guidelines, this policy, and the **federal** Uniform Guidance Procurement Plan & Procedures, if Child Nutrition guidelines are incorporated into the Plan.

USDA Bidding Guidelines:

The Child Nutrition Department shall follow the more restrictive bid thresholds of either the USDA or this policy and award in like manner. Sealed bids and proposals shall be awarded by the Board of Education.

The Child Nutrition Procurement Plan shall be reviewed annually and updated, if necessary. If material changes are made to the plan, the revised plan shall be approved by the Superintendent or designee.

OTHER

A. Bidder Registration:

In an effort to create a fair and competitive opportunity for potential bidders to do business with the district, a potential bidder or existing supplier may register through the district's online supplier registration solution. Suppliers and registered bidders who fail to maintain a responsible status, update information as required, or fail to respond to two consecutive bid/quote invitations may be removed from the bid list at any time and for any length of time.

B. Supplier Registration:

In order to obtain all necessary information required by the Internal Revenue Service and to ensure that supplier's order and remittance information is correct, the district requires suppliers to register using the district's defined method for supplier registration. New and existing suppliers must agree to the terms and conditions of the district's official purchase order. The Board of Education authorizes the Chief Financial Officer, Director of Accounting, or the Director of Purchasing, or their designee(s), to complete and sign supplier-required documentation.

C. Construction Contracts:

Contracts for the purpose of making any public improvement, constructing or making repairs to any public building as defined by the Competitive Bidding Act of 1974 shall be made in accordance with the provisions of the Act and Board of Education policy.

D. School Buses:

Pursuant to Oklahoma law, all school buses shall be purchased **using utilizing the State contract or** the sealed-bid method.

E. Motivational Items:

The Board of Education will allow the purchase of inexpensive student items to be given to students as a motivational tool for use in classroom instruction providing the planned activity furthers the adopted mission of the district and is in compliance with state law.

F. Student Gifts

The Board of Education allows for the infrequent purchase of student gifts and prizes from a student activity fund without the need to tag the asset or declare it surplus, provided a statement with the purchase order number on it is signed by the student recipient of the gift and sent to the Director of Accounting to be attached to the purchase order.

G. Reimbursement of Non-travel Related and/or Meal-Related Purchased Goods or Services

It is the intent of the district for employees to use the requisition and purchase order **system method** for acquiring goods and services; however, in situations where

- the vendor/supplier will not accept a district purchase order and an alternate vendor/supplier is not available,
- the P-Card cannot be used,
- it is extremely impractical, or
- it is an emergency, then

employees may request to be reimbursed for the personal purchase of said goods and services. If approved for reimbursement, employees may be reimbursed for the cost of the goods but may not be reimbursed for any associated sales tax without approval by the CFO, Encumbrance Clerk, or Assistant Encumbrance Clerks. The intent is to discourage reimbursement of sales tax for non-travel-related reimbursements except when the vendor

does not accept a district purchase order.

Employees will not be reimbursed for inventoried assets, including but not limited to, non-serialized and serialized furniture, fixtures and equipment and all fixed assets that do not meet the above-noted exceptions without prior approval from the Chief Financial Officer, Director of Financial Reporting, or Director of Accounting. If approved for reimbursement, the payment will not be issued until the goods have been inventoried and tagged by the district's Fixed Asset Department and a purchase order has been issued and approved by the Board of Education.

All requests for reimbursement must be supported with the original itemized receipt, unless a per diem meal reimbursement is instituted. Where the vendor/supplier does not provide an itemized receipt, the employee must furnish an original receipt and documentation which includes the date of the purchase and the price and description of the goods or services purchased.

The district assumes no liability for the purchase of goods or services purchased by an employee or for reimbursing the employee.

If the reimbursement request is approved, the employee will not be reimbursed until a purchase order has been issued and approved by the Board of Education and appropriate documentation has been provided. Personal reimbursements against General Funds, Building Funds or Child Nutrition funds must be pre-approved by the Superintendent or Chief Financial Officer. No personal reimbursements will be made from bond funds.

H. Employee Gifts and Clothing

Pursuant to IRS regulations, gifts or non-uniform clothing purchased with district activity funds that exceed \$25 per item per calendar year will be reported as income to be included on the employee's year-end W-2 form. Gift cards of any amount are considered to be cash by the IRS and are not appropriate gifts for employees.

PROHIBITED PURCHASING PRACTICES

A. Acceptance of Gratuities or Gifts:

District employees are expressly forbidden from accepting gratuities or gifts from any vendor or supplier except as provided for by this policy. Gratuities as specified under this policy include cash or assets easily convertible to cash, travel, lodging, tickets, appliances, automobiles or their use, or any other form of special treatment which might influence the employees' selection of a supplier. With the Superintendent's approval or prior Board approval, employees may accept vendor-/supplier-provided travel, lodging and registration, provided said travel is for the purpose of attending professional development conferences, workshops, presentations or training.

Acceptance of prizes received from random drawings at professional development events made equally available to all participants at no cost or obligation to the employee or to the district may be permitted.

Promotional and advertising novelties, business meals, and tickets with an individual face value of \$200 each or less are not considered gratuities under this policy.

Federal Programs/Funds - No officers, employees, ~~and~~ agents, **or board member** of the district, participating in the selection, award, or administration of a federal award, shall either solicit or accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts. Notwithstanding E-Rate Requirements, in situations where the financial interest is not substantial or the gift is an unsolicited item of nominal value, the district's established gift policy may be applicable.

In instances where the district's rules on the acceptance of gratuities, favors, or anything of value is more restrictive than the federal Uniform Guidance, the district's rules shall apply.

B. E-Rate Provisions:

No employee shall accept any gratuities or thing(s) valuing twenty (20) dollars or more from any supplier of goods or services awarded a contract to provide goods or services under the Schools and Libraries Division E-Rate program or associated Oklahoma Universal Service Fund (OUSF) programs. Furthermore, the annual maximum receipt of thing(s) of value for the school district shall not exceed fifty (50) dollars or the maximum amount permitted under applicable E-Rate and OUSF program regulations as amended.

C. Violations of Purchasing Policy:

District employees violating this policy, exceeding their purchasing authority or incurring an expense without a pre-approved purchase order may be held personally and financially liable and subject to disciplinary action including, but not limited to, suspension, demotion, termination and legal action.

Revised 6/10/96

Revised 12/8/97

Revised 12/14/98

Revised 12/13/99

Revised 1/8/01

Revised 1/14/02

Revised 12/8/03

Revised 12/13/04

Revised 1/16/06

Revised 2/12/07

Revised 12/10/07

Revised 11/10/08

Revised 1/18/10

Revised 11/8/10

Revised 12/12/11

Revised 12/10/12

Revised 12/9/13

Revised 12/14/15

Revised 11/14/16

Revised 7/1/17

Revised 12/11/17

Revised 12/10/18

Revised 12/9/19

Revised 12/14/2020

Revised 11/8/21

Revised 12/12/22

Revised 12/11/23

Revision 12/9/24

Proposed Revision 11/10/25

The annual operating budget is the financial plan for the operation of the district. It provides the framework for both expenditures and revenues for the year and translates into financial terms the educational programs and priorities for the district.

The Superintendent and/or Chief Financial Officer will assume responsibility for preparing the annual school budget for presentation to, and review by, the Board of Education.

The Superintendent and/or Chief Financial Officer will receive input from administrative personnel to identify the budgetary needs of the district. Administrative personnel are expected to confer with their staff in obtaining budgetary requests and information on requirements.

After a proposed budget has been developed for each responsibility center, the Superintendent and/or Chief Financial Officer will coordinate the requests and present a recommended budget to the Board of Education for a review.

The Board of Education expects its administrative staff to operate the school system within the budget amounts established for their particular department, school, project and/or grant.

Budget categorical information will be prepared and approved according to the State School District Budget Act Guidelines or as per the Estimate of Needs Budget Guidelines as indicated and below:

APPROPRIATIONS

A. Temporary Appropriation:

The Board of Education of the district shall present to the County Excise Board a Temporary Appropriation application in July, or before, for the General, ~~Fund and Building Funds~~, ~~Funds~~, and ~~Child Nutrition Funds~~. Warrants and/or checks may be drawn against the temporary appropriations pending action by the Excise Board upon the annual Estimate of Needs and budget of the district for the fiscal year. The amount that may be appropriated by such temporary appropriations shall in no event exceed the entire amount which the Board of Education of the district making the application estimates will be available for the entire fiscal year. Any such temporary appropriations so approved by the Excise Board shall, when the annual budget for the district is finally approved, be merged with the annual appropriations for the same purposes, and any warrants and/or checks which have been, in the meantime, drawn against such temporary appropriations shall be charged against the final approved annual appropriations of the district for the said current fiscal year.

B. Estimate of Needs:

The Board of Education shall meet prior to September 30 of each year and shall make, in writing, a financial statement showing the true fiscal condition of the district as of the close of the previous fiscal year ended June 30 and, prior to October 1, shall make a written, itemized statement of estimated needs and probable income from all sources including ad valorem tax for the current fiscal year for the General, Building and Child Nutrition Funds. Such financial statement shall be supported by schedules or exhibits showing, by fund source of revenue and function, the amount of all receipts and disbursements, respectively, and shall be sworn to as being true and correct. The statement of estimated needs shall be itemized by fund and function: (a) the several amounts necessary for the current expense of the district; (b) the amount required by law to be provided for sinking fund purposes; (c) the probable income that will be received from all sources, including interest income and ad valorem taxes; and, shall be detailed in form and amount so as to disclose the several items for which the Excise Board is authorized and required to approve estimates and make appropriations. The Estimate of Needs financial publication sheet for the district shall be published in one issue in a legally qualified newspaper of general circulation therein. The financial statement and estimates shall be filed with the County Excise Board on or before October 1 of each year. The Superintendent or designee is allowed to deviate from the annual budget policy if state law changes or if the Board of Education elects to adopt the alternative budget method.

The Board of Education authorizes the Superintendent, Chief Financial Officer or designee to complete forms 307 or 150 to apply for a supplemental appropriation if the funds received during the fiscal year are in excess of original Excise Board appropriation.

1. Form 307: Request for approval of state aid and/or federal funds. Requires county clerk's approval only.
2. Form 150: Supplemental estimates for local revenue being placed in the General Fund and Building Fund. Requires Excise Board approval, but does not require publication.

C. The Board of Education authorizes the Superintendent or the Chief Financial Officer to utilize either the legally available Estimate of Needs or the School Budget Act to prepare the annual school budget. The Estimate of Needs or School Budget Act budget document must be submitted to the Board of Education for approval prior to being submitted to the county for approval.

BUDGET OPERATION AND CONTROL

The appropriation serves as the legal authority for the district to incur liabilities and expend funds. The legal appropriation is approved on a fund basis. Therefore, the fund total is the sole constraint, or limitation, for budget control purposes under the legal appropriation.

To operate on an effective and efficient basis, the district will adopt operating budgets for the General Fund, Building Fund and Child Nutrition Fund. While the legal appropriation continues as the ultimate limitation, the operating budgets provide greater detail and control within which to manage the funds of the district.

Budget transfers may occur with the approval of the Superintendent or Chief Financial Officer provided the total approved appropriation, by fund, remains unchanged.

The original operating budgets will be adopted prior to October 1 of the fiscal year. Budget revisions, amendments or supplemental appropriations to operating budgets, or legal budgets, will be made as new circumstances arise or information becomes available or as required by State Laws.

Revised 6/10/96

Revised 12/8/97

Revised 12/14/98

Revised 12/13/99

Revised 1/13/03

Revised 12/13/04

Revised 2/12/07

Revised 12/10/07

Revised 11/8/10

Revised 12/9/13

Revised 12/12/22

Proposed Revision 11/10/25

This policy identifies and establishes basic guidelines regarding Activity Funds, as well as identifies the differences between grants and crowdfunding, and establishes guidelines regarding crowdfunding, school-related fundraising, selling products, or door prizes using school-supported organizations' names, the school's name, or involving students and employees.

ACTIVITY FUNDS

Activity funds are revenues collected from student or other extracurricular activities that are conducted in the school district, and control of such funds is statutorily exercised by the Board of Education. These funds are non-appropriated funds (not received from state or federal government or through local tax receipts). School Activity Funds are managed and operated under the guidance of a district staff member for the benefit of students, and are governed by policies and guidelines set by the Oklahoma Department of Education, Oklahoma Statute Title 70 § 5-129 and the Union Public Schools Board of Education. The Board of Education authorizes the Superintendent and/or Chief Financial Officer or designees to establish School Activity Fund procedures and practices consistent with Board of Education policies and Oklahoma law.

School activity fund budgets must be approved by the Board of Education annually and when revised.

Establishment of new activity fund sub-accounts for student organizations must be approved by the Superintendent or designee prior to Board of Education approval.

Provided any activity fund sub-account has fulfilled the function and purpose for which the account was established, any remaining balance may be transferred to another sub-account by the Activity Funds District custodian after approval by the Board of Education.

Specific procedures for the School Activity Fund are detailed in the Union Public Schools Activity Fund Manual.

GRANTS

Grants are funds that are disbursed to a recipient or organization by a government department, foundation, or corporation to fund a specific project. To receive a grant, an application or proposal must be submitted to a potential funder and the recipient must meet certain qualifications. All grant applications must be received by the Director of Federal Programs or designee and approved by the Board of Education, if needed, prior to submission to the granting authority.

DONATIONS

Any single cash donation greater than \$100 must be approved by the Chief Financial Officer, or designee, and ratified by the Board of Education. Cash donations received with no designated use or purpose may be deposited in either an approved activity fund or the Gifts and Endowment fund. Cash donations received with a designated use or purpose, other than payroll-related, shall be deposited into the Gifts and Endowments fund. Cash donations to be used for tutoring or other payroll-dispersed expenditures shall be deposited in either an approved activity fund or the general fund.

Refer to Policy #3150, Asset Management, for guidelines regarding donations of furniture and equipment, which also must be approved by the Chief Financial Officer, or designee, and ratified by the Board of Education. Donations of consumable items may be accepted by the site or department administrator at their discretion.

CROWDFUNDING

Crowdfunding donations (collaborative funding via the Internet) by any employee outside of any sanctioned organization must follow Board of Education guidelines. In particular, crowdfunding applications must be completed, submitted and approved by the appropriate administrator(s) prior to the project being posted on the crowdfunding website and the subsequent crowdfunding donations must be approved by the Board of Education. Crowdfunding shall be used for the solicitation of tangible property. While crowdfunding platforms allow for the solicitation of funds to be used for professional development or field trips, these activities may only be requested when the funds are to be paid directly to the service provider, and not submitted directly to the District. All items purchased or donated through district-approved entities such as DonorsChoose.org become the property of the district and must be submitted to the Board of Education for approval and acceptance. See also Board Policy #3150 - Asset Management.

FUNDRAISING**POLICIES THAT AFFECT BOTH ELEMENTARY AND SECONDARY FUND-RAISING ACTIVITIES**

- A. Fund-raising activities shall be approved in advance by the principals so they will minimize time away from class, either during the activity or in training for participation in the activity.
- B. A faculty member or faculty sponsor must assist with a fund-raising activity.
- C. All funds received must be deposited in the school's activity fund, unless the Chief Financial Officer or designee has given prior approval to deposit into an alternate fund. When large fundraisers benefitting charitable organizations outside Union Public Schools are held at a site, checks may be addressed directly to the organization, i.e. United Way or Make a Wish. All checks for outside organizations must be delivered to the organization as soon as the fundraiser is completed.
- D. No company or other outside organization representative shall be permitted to visit the schools during school hours for the purpose of selling to students or faculty.
- E. Requests for school fund-raising activities must be approved by the Board of Education annually and when revised, in advance of the activity, in accordance with state law.
- F. Food sold to students during the school day must comply with the nutritional standards of the Healthy, Hunger-Free Kids Act of 2010, and those fundraisers must be approved by the Child Nutrition Department prior to the activity.
- G. All district purchasing policies must be followed.
- H. Fund-raising activities which involve consignment merchandise for resale shall be encumbered at one-hundred percent (100%) of the estimated cost of the goods or services. However, if the consignment goods are non-perishable and returnable, then with prior Board of Education approval, a minimum ten percent (10%) of the estimated cost of the goods or services must be encumbered.
- I. If an individual activity account does not have sufficient funds to encumber the cost of a proposed fund raiser, then the site principal may elect to provide temporary funding using the site general activity fund.
- J. Establishment of new activity fund projects for student organizations must be approved by the Superintendent or designee prior to Board of Education approval.
- K. No fund-raising activity shall be approved that will in any way interrupt or take away from class time either as part of the activity or in training for the activity with the following exceptions:
 - 1. Since physical education is an activity class which emphasizes physical fitness, certain athletic fundraising activities, such as a jog-a-thon, may be allowed during the time a student has allotted for physical education. The association must request this in writing, stating the type, date, purpose, and length of the activity. At no time will more than two days be allotted for each of these activities.
 - 2. Students may only participate in the actual athletic-type fundraiser during the time they have allotted for physical education.
 - 3. It is the desire and goal of the Board of Education to encourage all students to develop a deep appreciation for reading and good media skills. Furthermore, the Board of Education views book fairs as important vehicles in accomplishing these desires and goals. Therefore, book fairs may be allowed during the regular school hours as well as before and after school.

ELEMENTARY SCHOOL FUND-RAISING POLICY

- A. The sale of student pictures and book fairs are fund-raising activities which are allowed with prior Board of Education approval.
- B. No fund-raising activity shall be approved which, by its nature or by promised prizes or awards, would induce or require elementary students to go door-to-door without adult supervision (e.g., selling products or sponsorships).

SECONDARY SCHOOL FUND-RAISING POLICY

- A. The sale of student pictures and book fairs are fund-raising activities allowed with prior Board of Education approval.
- B. Fund raisers which are co-sponsored by a parent organization for the purpose of a trip to reward students for their successful participation in an organization or out-of-state competition must receive prior Board of Education approval.
- C. All fund-raising activities at the secondary level must be approved by the sponsor and principal establishing that

the fund raiser:

1. Meets the safety, moral, ecological, and economic standards reflected by the district and that it complies with federal, state, and local regulations.
2. Meets the criteria established by this policy.

Revised 6/10/96

Revised 12/8/97

Revised 12/14/15

Revised 11/14/16

Revised 1/8/01

Revised 1/14/02

Revised 12/8/03

Revised 12/13/04

Revised 12/10/07

Revised 12/8/14

Revised 12/10/18

Revised 12/9/19

Revised 12/14/2020

Revised 12/13/21

Revised 12/12/22

Proposed Revision 11/10/25

It is the policy of the Union Public School District to select a qualified audit firm to conduct an annual audit of all the district's books and accounts. The selection process shall be conducted as often as deemed necessary. This process should consist of soliciting written proposals from three or more firms. Any Board of Education member may recommend an auditing firm from the state-approved list of auditors to be contacted by the Chief Financial Officer or Board of Education president. . **The District shall ensure compliance with federal regulations under 2 CFR Part 200 Subpart F and Oklahoma State Law Title 70.**

Each firm contacted should be furnished the following information by the Chief Financial Officer or designee:

- A. The funds to be audited, **including federal awards.**
- B. The type of audit, both financial and compliance, and the interim consultation to be provided to the professional staff.
- C. A description of the school system and the records to be audited.
- D. The extent of auditing assistance available from district staff members.
- E. The contents of the audit report as required by the State Board of Education.
- F. The deadline for completing the audit **and submission to the Federal Audit Clearinghouse.**
- G. The procedures for reviewing the final report.

In selecting auditors, the following criteria should be considered:

- A. Training and experience, including that of partners and associates, either with school districts or comparable governmental entities.
- B. Planning ability and promptness.
- C. General reputation of firm.
- D. Recommendations of present clients.
- E. Current volume of work during proposed audit period.
- F. Quality of the firm's services outside the audit function.
- G. Quality of the firm's professional staff and availability for interim consultation.
- H. State approval.
- I. Experience with current GASB Statement reporting, **and the issuance of an Annual Comprehensive Financial Report (ACFR), and the issuance of a Single Audit.**

J. Independence and absence of conflicts of interest.

K. History of compliance with federal audit requirements.

L. Responsiveness to the Request for Proposal.

M. Price.

Revised 6/10/96

Revised 12/8/03

Revised 12/13/04

Revised 12/10/07

Revised 12/14/15

Revised 12/13/21

Proposed Revision 11/10/25

The building principal or director is the custodian of site inventories of furniture, non-consumable equipment and computers. Current building inventories are the responsibility of the principal, and classroom inventory is a responsibility of the teacher. Furniture and equipment inventories must be maintained by the site and submitted **upon request** to the Chief Financial Officer or designee **annually**. The fixed asset department will visit **some** sites and departments to verify the **submitted** inventory on an annual basis.

Inventories must be maintained by the district should it become necessary to file claims arising from fire, theft, or natural disaster damage.

Transfers of equipment and furniture must be reported to the Chief Financial Officer or designee. Transfers of technology equipment must be reported to the Chief Financial Officer or designee and the Executive Director of Technology.

All donated equipment and furniture must be reported to the Chief Financial Officer or designee and ratified by the Board of Education to become district assets. If the donation is technology-related, the Executive Director of Technology must approve the donation prior to the Board ratifying the donation.

Asset tags shall not be removed until the Board ratifies the asset for surplus and is staged for disposal.

All assets being disposed of must go through the district's surplus procedures and be ratified by the Board of Education before being disposed. Used textbooks, books, supplies and materials, not considered a fixed asset, serialized asset, or otherwise tagged equipment or furnishings, may be sold, donated, or discarded **without with the site or department administrator's approval, but does not require** Board ratification.

Any and all district-owned equipment and/or materials (including technology devices) in possession of an employee must be immediately returned upon request of the district and in all situations must be returned no later than the last day of employment. See Board Policy #4021.

Management of federal assets must follow the district's Uniform Guidance Procurement Plan and Procedures as amended.

Revised 6/10/96

Revised 12/8/97

Revised 12/13/99

Revised 1/8/01

Revised 12/13/04

Revised 2/12/07

Revised 12/10/07

Revised 11/8/10

Revised 12/14/15

Revised 11/14/16

Revised 12/9/19

Revised 12/11/23

Proposed Revision 11/10/25

SUMMARY AND RESPONSIBILITIES

The Board of Education believes that professional growth is integral to achieving the district's goals and mission. Employees and Board members are encouraged to participate in meetings, conferences, seminars, and workshops that promote professional growth or are essential to conducting district business. Employees may be authorized by administrative approval or by Board of Education approval to participate in professional growth or district business activities requiring travel. Authorization shall be based on the availability of funds, staffing requirements for the work area, the relationship of the activity to the employee's role in the district, and the employee's role within the organization sponsoring the activity.

District employees, members of the Board of Education, prospective employees for sponsored visits to the district, District guests, and volunteers who provide approved services on behalf of the district in lieu of district employees shall be reimbursed for their reasonable and necessary expenses while on authorized travel status on district business, subject to furnishing proper documentation of expenses for which reimbursement is requested. Travel approval may be contingent upon an employee's ability to fund travel expenses prior to reimbursement.

An individual traveling on district business is responsible to exercise the same care in incurring expenses that a prudent person would exercise if traveling on personal business. Excess costs for materials and supplies, circuitous routes, luxury accommodations or auto rentals, and services not necessary or justified in the performance of district business are to be avoided as standard practice.

Those performing authorized travel are responsible for the preparation and submission of the district's travel claim form and accompanying documentation within thirty (30) days of the completion of the travel. Regardless of who prepares the forms, the claimant will always retain responsibility for reporting travel expenses in an accurate and ethical manner, demonstrating compliance with all applicable Board policies related to travel.

This travel policy shall govern all official Union Public Schools travel, including travel funded under state or federal grants, contracts, or other authorized outside sources. Any exceptions to this policy shall be submitted to the Superintendent or Chief Financial Officer for consideration. All official district travel shall be properly authorized, reported, and reimbursed in accordance with Board policy, the laws of the State of Oklahoma, and other applicable federal or IRS regulations.

TRAVEL APPROVAL

Only persons designated by the Superintendent may approve travel and, after the travel is completed, approve claims for recommended payment by the district.

- A. All out-of-state travel must be approved by the Superintendent in advance of travel or requests for expenditures. A request form approved by the employee's supervisor must be submitted to the Superintendent in advance. The out-of-state travel authorization number assigned by the Superintendent must be included on the travel reimbursement claim form and all attached requisitions. Items to be included at a minimum are:
 1. Employee name and position.
 2. Date of projected travel.
 3. Business purpose of travel and benefit to district.
 4. Projected expenditures for transportation, lodging, meals, incidental expenses, registration costs, rental vehicle, other.
 5. Funding source.
- B. With prior Superintendent approval or prior Board of Education approval, employees may accept vendor-provided travel, lodging, and registration provided said travel is for the purpose of attending professional development conferences, workshops, presentations, or training.
- C. Site/Department Approval
 1. All forms related to travel must initially be approved by the site/department administrator with appropriate decision-making authority.
 2. This authorized approver is responsible for verifying:
 - a. the purpose of the travel is valid and directly related to the district's educational mission or business goals;
 - b. the total cost of the trip is within the approved OCAS project budget;
 - c. expenses are charged to the proper OCAS codes.
- D. Central Administrative Approval
 1. After site/department approval, the forms must be approved by the Associate Superintendent, the appropriate Assistant Superintendent, the Chief Financial Officer, Senior Executive Director, or Executive Director of Elementary or Secondary Education.

2. This administrator is responsible for ensuring compliance with Board policy and will verify that information on the form and in the accompanying documentation is reasonable, complete, and accurate.
- E. Claimants may neither authorize their own travel nor approve the reimbursement of their own travel expenses.
- F. Teachers on official school business that require expenses may be reimbursed if:
 1. Prior authorization has been requested and approved on a Professional Leave Request.
 2. The Professional Leave Request is submitted to the Executive Director of Human Resources or Superintendent by the immediate supervisor of the employee making the request.
- G. Activity accounts may be used for travel expenses incurred for school activities, professional meetings, etc., once budget authorization has been approved by the Board of Education and the out-of-state travel request approved by the Superintendent. Employees may not use student-raised activity fund revenue to pay for adult travel.

NON-EMPLOYEE TRAVEL

There may be times when individuals not employed pursuant to employment contracts with the district perform approved services on behalf of the district that are similar to duties performed by employees, and may be reimbursed for their reasonable and necessary expenses while on authorized travel status on district business, subject to furnishing proper documentation of expenses for which reimbursement is requested.

- A. Volunteers
 1. Volunteers may be authorized to perform duties for which travel reimbursement is to be paid. Reimbursement claims will be honored only if written authorization to receive reimbursement for performance of the services is issued by the Superintendent prior to the rendering of the volunteer services. For example, if a parent is authorized by the Superintendent to transport participating students to a school event in lieu of the district providing such transportation, a pre-approval form for reimbursement must be signed by the designated approving official for mileage reimbursement to be made after the trip. Separate written authorization is not needed for services that written documentation shows is to be furnished on a repeated performance basis during the school year. For example, a written Individualized Education Plan (IEP) providing that the parent shall transport a student with disabilities to school in lieu of district transportation and that the parent will be reimbursed for such mileage provides sufficient written authorization for reimbursement during the time period that provision is part of the IEP.
 2. Volunteers must be performing substantial and necessary employment-like work for the benefit of the district which has been pre-approved by the Superintendent. Reimbursement for expenses incurred by a volunteer must be authorized in writing by the Superintendent prior to the start of volunteer services. The above-referenced individuals are referred to as "claimants" or "travelers" in this policy.
- B. Prospective Employees -- Prospective employee travel costs for sponsored visits to the district for which the individual was assured that reasonable and necessary travel expenses would be paid are subject to the provisions of the district's travel policy.
- C. Students
 1. Travel expenses for students may be paid from general, activity, and/or gift fund.
 2. All out-of-state student travel must be approved by the Board of Education in advance of the travel.
 3. Student travel is subject to the provisions of Board Policies #5200 and #5250 in addition to the documentation and reimbursement procedures outlined in Board Policy #3200.
 4. When a student group travels out of district for an event that may require meals to be provided prior to returning to the district, the group sponsor/coach may be reimbursed out of an activity fund for the actual expense of meals purchased for the student group and him/herself. An overnight stay is not required for this reimbursement.
- D. District Guests
 1. The Superintendent may invite individuals to attend and/or participate in special District-sponsored events as District guests. Upon written approval from the Superintendent or designee, guest travel expenses shall be reimbursed by the District pursuant to this Board policy. District guests are referred to as "claimants" or "travelers" in this policy.
 2. District guest travel is subject to the documentation and reimbursement procedures outlined in this Board policy.

TRAVEL REIMBURSEMENT

The Oklahoma School Code authorizes a school district to reimburse Board of Education members, employees, and

other preauthorized individuals for necessary travel expenses. These procedures apply to the documentation and reimbursement of travel expenses of district employees, members of the Board of Education, prospective employees, District guests, students, and volunteers.

All travel will be approved and paid in accordance with district travel policy, state laws, and IRS guidelines. The Board of Education authorizes the encumbrance clerk to issue the purchase orders and pay travel-related reimbursements, POs for hotel, registration and airline, and Board-authorized travel pre-payments prior to travel provided the travel claim meets all Board policies and statutory requirements. These purchase orders must be submitted for Board of Education approval. Reimbursement will be made only for expenses which are reasonable and necessary to the transaction of official business in connection with the purpose of the travel and which are within Board policy. Cash advances to an employee shall not be issued.

Requests for reimbursement must be made on the proper expense reimbursement form, must be signed by the claimant and signed by the approving designated administrator, must have complete itemized receipts where required, and must be in accordance with district procedures. Expenses allowed may include:

A. Transportation Reimbursements:

1. It is in the District's best interest that employees work with the District's preferred vendor for booking air fare for business-related travel. The District is bill directly, eliminating the need for the employee to pay for air fare up front. When an employee must book airfare directly, reimbursement to the employee will occur after completion of the trip.
2. Air fare shall be reimbursed on actual cost basis and supported by documentation verifying proof of payment. Air travel shall be at coach rate. Air travel cost may also include baggage fees, seat fees, or other fees associated with air travel.
3. Personal automobile reimbursement costs shall not exceed the cost of flying coach. Reimbursement will be made only for the most direct route in travel and shall be supported by:
 - (a) Date of travel.
 - (b) Business purpose of travel.
 - (c) Miles traveled.
 - (d) Allowance of IRS prevailing rate per mile by the shortest, most direct travel route from the authorized point of departure is allowed for each individual if performed by conveyance other than that owned by the district. Employee will be reimbursed for mileage to and from the employee's principal work site. **No reimbursement will be made for travel to and from hotel to conference/meeting location.** Reimbursement may be made for travel expenses incurred both within and without the district, but no reimbursement will be allowed for travel between the regular work site and the residence of an employee or between the site of a regular Board meeting and the residence of a Board of Education member. Travel by commercial conveyance will be reimbursed at actual cost when supported by valid receipts.
 - (e) Comparative cost calculations when choosing travel via personal automobile rather than air travel. The amount reimbursed for mileage shall be the lesser of the cost of a coach airline ticket or mileage at the established IRS rate for the most direct route.
3. District-owned vehicles -- Valid itemized receipts or documentation for necessary gas, oil, turnpike charges, parking, and repairs are required if purchased from personal funds for travel in district-owned conveyance.
4. Ground transportation shall be reimbursed on actual cost basis and supported by documentation. Non-business use of ground transportation shall not be reimbursed.
5. Parking fees and turnpike tolls shall be reimbursed on actual cost basis and supported by itemized documentation.
6. Rental car shall be reimbursed on actual cost basis and supported by itemized documentation.

B. Lodging Reimbursement:

1. Reimbursement shall be based on the actual cost incurred and supported by itemized documentation.
2. Every effort shall be made to stay at a conference-associated hotel. Hotel information from the conference/event sponsor shall be attached to the request for expenditure. If a conference-associated hotel is not available, every effort shall be made to locate a hotel offering the Federal GSA CONUS daily lodging rate.
3. The maximum amount to be reimbursed shall not exceed the actual cost of a single room rate, or double room rate if two district employees occupy the same room.
4. Itemized receipts listing the guest's name, the amounts charged, and showing printed name and address of service business must accompany all requests for reimbursement. Lodging receipts should indicate a zero balance or a charge to a credit card.
5. All lodging shall be secured at a reasonable rate for the activity and/or event scheduled. Lodging at a short-term residential rental property (such as Airbnb, vrbo, etc.) is not approved by the District and is not reimbursable for employee or student travel.

C. Meal Reimbursements:

1. Per IRS regulations, meal reimbursements can only be paid if travel includes an overnight stay. Meals shall be reimbursed on a per diem basis.
2. Per diem reimbursement for meal allowance shall be based on the Federal GSA CONUS rates at the time of travel. Meal ticket receipts are not required for per diem allowances.
3. When submitting REQs for conference travel, detailed registration information including an agenda is needed to determine maximum allowable per diem for meals. If a detailed agenda is not available prior to registration, the daily agenda must be included with the personal reimbursement request. CONUS rates vary by location and include separate amounts for breakfast, lunch and dinner. If any meals are provided by the conference/event, the corresponding meal allowance shall not be included in the requested reimbursement. For example, if lunch is included in the conference registration fee, the lunch portion of the per diem shall be deducted from the daily per diem to determine the reimbursable amount.
4. No purchase of alcohol will be reimbursed.

D. Other Travel Expenses – Other travel expenses as approved with accompanying itemized receipts and descriptions would include, but not be limited to:

1. Meals for others (must indicate business relationship along with all other requirements for meal reimbursement). The purchase of business-related meals for others must be approved in advance by the Superintendent, Chief Financial Officer, Associate Superintendent, Assistant Superintendent, Senior Executive Director, or Executive Director.
2. Miscellaneous supplies, including workshop/conference materials.
3. Registration fees.

E. Travel Expenses of Persons with Disabilities – Payment may be approved for extraordinary expenses incurred in travel by an individual with a disability as defined by the Rehabilitation Act of 1973. Reimbursement requires that expenses be approved and authorized by the Superintendent and identified on the travel claim form as “Reasonable Accommodations for Claimant with Disability as Approved by the Superintendent.” Expenses allowed may include:

1. Transportation, lodging, and subsistence expenses incurred by an attendant approved and authorized to accompany the claimant when assistance is necessary for travel.
2. Cost of specialized transportation to and from the points of travel.
3. Costs of specialized services provided by a commercial carrier necessary to accommodate the claimant’s disability.
4. Costs incurred as a direct result of the claimant’s disability for baggage handling in connection with public transportation or at lodging facilities.
5. Cost of renting and/or transporting a wheelchair.

F. Other Special Circumstances

1. If prepayment of the initial cost of district-required travel is requested, the employee may, upon approval by the Chief Financial Officer or the Director of Accounting, submit appropriate documentation to be reimbursed for airfare, registration fees, and/or hotel deposits prior to the date of travel, as long as the expenses are within statutory guidelines. Additional documentation may be required upon completion of the travel including boarding passes, registration confirmations and/or lodging receipts. The employee may be required to reimburse the district the amount of the prepaid expense if the employee fails to complete the travel. Any costs associated with a change in travel itinerary will be reimbursed to the traveler if the change is essential to conducting district business.
2. Financial hardship may ultimately necessitate appointing a substitute traveler.
3. Employees are not authorized to pay the travel expenses of another employee without approval from the Superintendent or Chief Financial Officer prior to making travel arrangements.

REPORTING TRAVEL EXPENSES

Those performing authorized travel are responsible for the initial cost of travel, the preparation and submission of the district’s travel reimbursement claim form and accompanying documents within thirty (30) days after the travel is completed. When traveling, the claimant should obtain appropriate, itemized original receipts for all applicable charges and keep a personal record of miscellaneous expenditures charged to the district so that necessary documentation is accumulated and available to prepare and submit with the travel reimbursement claim form.

The travel reimbursement claim form must be signed by the claimant seeking reimbursement. The claimant’s signature affirms that the travel was performed as stated and that the claim for reimbursement is a true and correct

account of expenses. The signature also certifies that none of the expenses claimed have been previously reimbursed or otherwise provided by other sources. Claimants are warned that by their signature, the claimant is held liable under possible penalty of law for any falsified expenses or misstatement of claim, in addition to adverse employment actions that may be taken by the district against an employee/claimant, including possible employment termination.

- A. Claims for reimbursement for travel expenses must be signed by the claimant and by the approving designated administrator and submitted on the district travel claim form. Completion may be made by means of computer, typewriter, or clearly legible handwriting. Request for reimbursement with insufficient or incomplete documentation will be denied.
- B. Claims should be submitted within thirty (30) days after travel is completed. Notwithstanding this time limitation, all requests for reimbursement must be made prior to the end of the fiscal year or be encumbered with an open purchase order prior to June 30. Reimbursement requests not complying with these requirements will be denied unless unusual circumstances are presented to and approved by the Superintendent, the Chief Financial Officer, or designee.
- C. The claim must be submitted to the designated official for approval who, after review and approval of the claim, is to sign authorization for disbursement of funds and verify that the claim complies with the requirements of this policy.
- D. The Chief Financial Officer, Director of Accounting, or designee is responsible for the final audit of the reimbursement claim for accuracy, completeness, validity, and compliance before processing the claim through the Accounting Department for payment.
 1. Errors in calculation or procedure shall be corrected and the claimant provided with a corrected copy or notified of the change in dollar amount on the travel reimbursement claim form.
 2. Issues involving an interpretation of law, policy, or procedure shall be corrected or returned to the authorizing administrator or claimant.
 3. Issues unresolved by the authorizing administrator and the Chief Financial Officer shall be forwarded to the Superintendent for a final decision.
- E. A claimant must state the purpose of the travel in the appropriate space on the travel claim form. Although the statement should be concise, it must be clear enough that an ordinary citizen would understand the purpose of the trip.
- F. Travel status begins when the employee leaves the district or authorized point of departure and ends when the employee returns to the district or authorized final destination. The inclusive dates during which the travel was conducted must be shown on the travel form. If available, the formal announcement or brochure that includes the dates of a meeting, workshop, conference, or event should be attached to the travel claim form.
- G. Reimbursement for meals and lodging expenses for overnight travel without prior approval shall not exceed more than 24 hours before/after the date/time the meeting, workshop, conference, or event began and/or ended. With prior approval of travel by driving rather than flying an additional day beyond the initial 24 hours may be allowed before/after the event, based on total miles to be driven. With prior approval, if it is in the best interest of the district, an exception is allowed only if a saving in travel costs is available through the purchase of discount airline tickets in connection with commercial airline flights. If such savings are available, reimbursement may be allowed to begin or end up to 48 hours before or 48 hours after the date of the object of travel, provided that any extra day of travel must be on a weekend.
- H. Ordinarily, expenses incurred outside the period of travel will not be reimbursed. However, incidental before-and after-travel expenses consequential to the completion of the purpose of the travel may be reimbursed as related trip expenses and, with prior approval, may extend the 24-hour travel period.
- I. Expense of spouse attending conference/meeting shall not be paid with district funds.
- J. A claimant may be reimbursed only for expenses the claimant personally incurred and is entitled to claim as reasonable and necessary travel expenses. If charges for multiple individuals or non-reimbursable items appear on a receipt, the claimant shall clearly identify the items for which they are seeking reimbursement. The claimant is responsible for the accuracy of the travel claim form.
- K. The "Miscellaneous Costs" section on the travel claim form:
 1. Miscellaneous expenses must be listed separately under the "miscellaneous expense" category. An expense will not qualify as miscellaneous travel expense unless it is clearly connected with the purpose of the travel and cannot be otherwise grouped in another category of travel expense on the travel claim form. There must be a clear business reason for incurring these expenses. If the business connection of the expense with the purpose of the travel is not clear, additional information may be required to determine if the claimed expense is valid. If the claimant has doubt as to the connection to a valid business purpose, a statement explaining the expense should be attached to the travel claim to minimize delay of payment. Purchases and charges of a personal nature, such as telephone calls not necessary to the travel purpose or employment duties, reading materials, over-the-counter medications, alcoholic beverages, movies, non-meal snacks, non-business use of transportation, etc., are not allowable miscellaneous reimbursement expenses.

2. Miscellaneous travel expenses may include, business communications such as Internet access, telephone, postage and fax charges (when approved and authorized); baggage handling for equipment and materials; non-personal emergency and other expenses incidental to the purpose of travel.
- L. Documentation – Original receipts must be attached to travel claim forms when seeking reimbursement for any miscellaneous expense item including any sales tax associated with the purchase and for the expenses listed below in subsections 1 through 4, regardless of the amount. By law, all receipts are to contain the following information:

1. Date the expense was incurred.
2. Quantity purchased and amount paid.
3. Description of the goods or services purchased.
4. Name and address of the vendor, if available.

A credit card slip alone, which is the customer's copy of a credit card charge form, may not be sufficient to qualify as a receipt. To qualify as a receipt, a credit card slip should be attached to a supporting vendor receipt, if available, which contains all the information required of a receipt.

Some types of expenses require more than the above information for reimbursement. Receipts acknowledging payment by the vendor for the following expenses should include the additional facts noted after each listed expense.

1. Lodging - The room rate charged, an itemized list of all charges included on the bill, and an acknowledgement or verification that the bill has been paid.
2. Registration/Tuition - An itemized list of all charges and an acknowledgement or verification of receipt of payment.
3. Common carrier passenger's ticket receipt - The passenger's ticket receipt issued by the common carrier agent must show the passenger's name, the number of seats charged, the date of arrival or departure, and the destination points.
4. Hire of travel conveyance - The vendor for the rent or lease of a vehicle must issue a receipt showing all charges paid, including any purchases of fuel and payment of other purchases made in the operation of the rented or leased vehicle, and the amount of miles driven.

M.If one of the three major categories of expenses - meals, lodging and transportation - are omitted for overnight travel and one or both of the others is claimed, the claim form must be either

1. annotated with a statement to cross reference to another claim by number where the omitted expense item was claimed;
2. must show that payment of the omitted expenses was made by another source; or
3. must state that no reimbursement is being claimed for omitted expenses. For example, if meals are claimed, there needs to be a notation that lodging or transportation is being claimed or not claimed. If lodging is claimed, there must be a notation regarding whether meals and/or transportation are claimed or not claimed. The notation may be a simple "no charge" or "zero expenses."

N.Payment of travel expenses of a person who thereafter becomes deceased is to be made to the estate of the claimant. The travel claim form shall be in the name of the deceased person and the assignment section completed for payment to the "Estate of (claimant's name)." The assignment section and the claim form are to be signed by the decedent's spouse, appointed power of attorney, or estate representative.

O.For non-Federally funded travel only, if a receipt for an expense item is lost or it is impossible or impractical to furnish one, a letter of full explanation of the lack of receipt documentation and an itemized list of what, where, and when the items were purchased must be submitted and attached to the travel claim form. A signed and dated statement or affidavit of lost or unavailable receipt by the claimant may be used to document lost or unavailable receipts. The affidavit must include the name of the claimant, the inclusive dates of travel, an itemized list of expenses for which the required receipts are missing, and a full explanation of how receipts were lost or destroyed. The reviewing authority may take the time needed to investigate any such request for reimbursement before taking action.

Revised 6/10/96
Revised 12/14/98
Revised 12/13/99
Revised 1/8/01
Revised 1/13/03
Revised 12/8/03
Revised 12/13/04
Revised 2/12/07
Revised 12/10/07

Revised 12/8/97

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Revised 11/10/08

Revised 1/18/10

Revised 11/8/10

Revised 12/10/12

Revised 12/9/13

Revised 12/8/14

Revised 12/14/15

Revised 12/11/17

Revised 12/10/18

Revised 12/9/19

Revised 12/12/22

Revised 12/11/23

Proposed Revision 11/10/25

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Introduction and Policy

Title IX prohibits discrimination on the basis of sex in education programs and activities that receives federal financial assistance. Title IX applies to employees and students. The policy establishes procedures for reporting sex discrimination, sexual harassment, and related retaliation, provides the grievance process procedure for a Title IX formal complaint for sexual harassment, sets forth supportive measures for a complainant and, as appropriate, a respondent, and a range of possible sanctions should a respondent be found responsible for sexual harassment.

The district condemns discrimination in its education programs and activities based on sex. Any district employee with actual knowledge of conduct that constitutes sex discrimination and/or sexual harassment is directed to notify the Title IX Coordinator as soon as possible.

Scope of the Policy

This policy applies to individuals working or participating in the district's education programs and activities in locations where the district exercises substantial control over both the respondent and the context in which discrimination or harassment occurred. Title IX may apply to any of the district's education programs or activities in the United States, whether such programs or activities occur on-campus or off-campus, including online instruction, admissions, recruiting, financial aid, academic programs, student services, counseling and guidance, discipline, class assignment, grading, recreation, athletics, and employment. Reports of violations of this policy may be made in person, by mail, by telephone, or by email, using the contact information listed for the Title IX Coordinator, or by any other means that results in the Title IX Coordinator receiving the person's verbal or written report. Such a report may be made at any time, including during non-business hours, by using the telephone number or email address, or by mail to the office address listed for the Title IX Coordinator.

Individuals are responsible for immediately reporting any knowledge or information concerning sexual harassment to the district's Title IX Coordinator.

Definitions

- A. Actual Knowledge: Notice of sexual harassment or allegations of sexual harassment to the Title IX Coordinator or to any district employee. This standard is not met when the only official of the district with actual knowledge is the respondent.
- B. Advisor: A person who has agreed to assist a complainant or respondent during the Title IX process. The advisor may be a person of the student's choosing, including but not limited to a district faculty or staff member, a friend, or an attorney.
- C. Complainant: An individual who is alleged to be the victim of conduct that could constitute sexual harassment.
- D. Title IX Coordinator(s): Employee(s) of the district who has/have primary responsibility for overseeing the process of coordinating the district's compliance efforts, receiving complaints, conducting investigations, imposing sanctions, facilitating appeals, and providing education and training associated with this policy. The Title IX Coordinator(s) will further monitor the district's education programs and activities for barriers to reporting information about conduct that constitutes sex discrimination and take steps reasonably calculated to address such barriers. The Coordinator should not have a conflict of interest or bias for or against complainants or respondents generally or an individual complainant or respondent that may affect the outcome of the grievance process.
- E. Deputy Coordinator: If desired by the district, this is a district employee designated by the Title IX Coordinator or the district to serve as the Coordinator where appropriate and to assist with the duties of the Title IX Coordinator. The Deputy Coordinator should not have a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that may affect the outcome of the grievance process.

- F. Formal complaint: A written document filed by a complainant or signed by the Title IX Coordinator alleging sexual harassment against a respondent and requesting that the district investigate the allegation(s) of sexual harassment and stating the date, time, place, name(s) of person(s) involved (e.g., the accused, witnesses) and sufficient detail to satisfy the basic elements of a Title IX claim under this policy. At the time of filing a formal complaint, a complainant must be participating in or attempting to participate in the education program or activity of the district.
- G. Respondent: An individual who has been reported to be the perpetrator of conduct that could constitute sexual harassment.
- H. Sex Discrimination: Sex discrimination includes sexual harassment and is defined as conduct directed at a specific individual or a group of identifiable individuals that subjects the individual or group to treatment that adversely affects their education, employment, or school-related benefits, on account of sex or gender (including on the basis of a student's pregnancy, childbirth, false pregnancy, termination of pregnancy or recovery therefrom). This may include acts of verbal, nonverbal, or physical aggression, intimidation, or hostility based on sex even if those acts do not involve conduct of a sexual nature.
- I. Sexual Harassment: Conduct on the basis of sex that satisfies one or more of the following:
- An employee of the district conditioning the provision of an aid, benefit, or service of the district on an individual's participation in unwelcome sexual conduct ("quid pro quo");
 - Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to the district's education program or activity ("hostile environment"); or
 - Sexual assault, dating violence, domestic violence, or stalking as defined by federal law.

Whether conduct creates a hostile environment is a fact-based inquiry that includes, but is not limited to, the following:

- The degree to which the conduct affected the complainant's ability to access the district's education program or activity;
 - The type, frequency, and duration of the conduct;
 - The parties' ages, roles within the district's education program or activity, previous interactions, and other factors about each party that may be relevant to evaluating the effects of the conduct;
 - The location of the conduct and the context in which the conduct occurred; and
 - other sexual harassment in the district's education program or activity.
- J. Supportive measures: Individualized services reasonably available that are non-punitive, non-disciplinary, and not unreasonably burdensome to the other party while designed to ensure equal educational access, protect safety, or deter sexual harassment.

Examples of Supportive Measures:

- Counseling
- Extension of deadlines and other course-related adjustments
- Campus escort services
- Restrictions on contact applied to one or more parties
- Leaves of absence
- Increased security measures and monitoring of district premises
- Training and education programs related to sexual harassment

- K. Title IX Hearing Officer (decisionmaker): The individual may be a district administrator, legal counsel, specially trained officer but cannot be the Coordinator or Investigator. The primary responsibility of the Hearing Officer is to ensure both parties receive due process in the event allegations of a Title IX policy violation are directed to a hearing by the Title IX Coordinator. The Hearing Officer should not have a conflict of interest or bias for or against complainants or respondents generally or an individual complainant or respondent that may affect the outcome of the grievance process.
- L. Title IX Investigators: An individual charged with collecting statements and any evidence directly related to any allegations, as directed by the Title IX Coordinator. Investigators may include but not be limited to district administration. The Investigator should not have a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that may affect the outcome of the grievance process.
- M. Working days: Days on which the district administration's office is open.

Reporting

All forms of sex discrimination, including sexual harassment, may be reported to the Title IX Coordinator, any Deputy Title Coordinator, any district employee, or to law enforcement, no matter the severity. A report of sex discrimination and/or sexual harassment should be made as soon as possible but may be made at any time, regardless of length of time between alleged sex discrimination and/or sexual harassment, and the decision to report it. However, a delay in reporting may compromise subsequent investigation. The district will take reasonable steps to protect the privacy of the parties and witnesses during the pendency of the grievance process, provided that the steps do not restrict the ability of the parties to obtain and present evidence, consult with family members or other advisors, or otherwise prepare for or participate in the grievance procedures;

Although anyone may report sexual harassment, only alleged victims of sexual harassment or their parent or guardian may file a formal complaint.

No employee or student may discourage an individual from reporting alleged sex discrimination, including sexual harassment.

All district employees are mandatory reporters and are required to immediately report to the Title IX Coordinator any allegations of sexual harassment. Failure to do so may result in disciplinary action up to and including termination of employment

Pre-Investigation / Initial Response

Unless the Title IX Coordinator reasonably determines the conduct alleged could not constitute sex discrimination and/or sexual harassment, after receiving notice allegations involving purported sex discrimination and/or sexual harassment, the Title IX Coordinator will promptly contact the complainant, if known or identifiable, to notify them of receipt of the allegations of sex discrimination and/or sexual harassment.

The district will treat complainant and respondent equitably and offer supportive measures as appropriate. For complainants, this means non-disciplinary, non-punitive individualized services offered as appropriate, as reasonably available, and without fee or charge before or after the filing of a formal complaint or where no formal complaint has been filed. For a respondent, this means at a minimum following the grievance procedure for sexual harassment before the imposition of disciplinary sanctions or other actions that are not supportive measures.

The district will promptly take necessary steps to protect the complainant and ensure safety as necessary, including taking interim steps before the final outcome of any investigation once a report or knowledge of sexual harassment has been reported.

Emergency Removal. In some instances, the district may implement an emergency removal of a student when an individualized safety and risk analysis indicates that an immediate threat exists to the physical health or safety of an individual arising from the allegations of sexual harassment. A party subject to an emergency removal shall have an opportunity to challenge the decision immediately following the removal. By no means does this provision modify any rights under the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, or the Americans with Disabilities Act.

Administrative Leave. A non-student employee may be placed on administrative leave during the pendency of the grievance process. By no means does this provision modify any rights under Section 504 of the Rehabilitation Act of 1973 or the Americans with Disabilities Act.

Periodic updates on the status of the investigation will be provided to both the complainant and respondent.

Sex Discrimination without Harassment

If the allegations involve conduct that could constitute sex discrimination but not sexual harassment, the Title IX Coordinator will initiate an investigation in compliance with district policy.

Sexual Harassment

If the allegations involve conduct that could constitute sexual harassment, the Coordinator will contact the complainant to confidentially discuss the availability of supportive measures, consider the complainant's wishes with respect to supportive measures, inform the complainant of the availability of supportive measures with or without the filing of a formal complaint, and explain to the complainant the process for filing a formal complaint. A complainant's wishes regarding whether the district investigates will be respected unless the Title IX Coordinator determines that signing a formal complaint to initiate an investigation over the wishes of the complainant is not clearly unreasonable in light of the known circumstances.

Written Notice of Complaint

Upon receipt of a formal complaint, the Title IX Coordinator will provide written notice to all known parties in sufficient time and with sufficient detail to give the respondent time to prepare a response before an initial interview. Written notice includes:

- a. Notice of the grievance process, including any informal resolution process;
- b. Notice of the allegations of sexual harassment, including sufficient details (i.e., names of known parties, the conduct alleged to be sexual harassment, and the date and location of the conduct, if known);
- c. A statement that the respondent is presumed not responsible for the conduct and that responsibility will be determined at the conclusion of the grievance process;
- d. Notice of the parties' right to have an advisor (who may be, but is not required to be, an attorney) and to inspect and review evidence;
- e. A statement that retaliation by the parties or district is prohibited;
- f. A statement that the parties are entitled to an equal opportunity to access the relevant and not otherwise impermissible evidence or an accurate description of the evidence; and
- g. Notice that knowingly making false statements or providing false information in the grievance process is a violation of the code of conduct of students or a violation of performance and conduct standards for employees.

Dismissal of a Formal Complaint

The district must investigate the allegations in a formal complaint.

Mandatory Dismissal. A formal complaint must be dismissed when it is determined the conduct alleged in the formal complaint: 1) would not constitute sexual harassment as defined herein even if proved; 2) did not occur in the district's program or activity; or 3) did not occur against a person within the United States.

Permissive Dismissal. A formal complaint may be dismissed if, during the investigation or hearing, 1) a complainant notifies the Coordinator in writing that they would like to withdraw the formal complaint or any allegations therein; 2) the respondent is no longer enrolled or employed by the district; or 3) specific circumstances prevent the district from gathering sufficient evidence to reach a determination as to the formal complaint or the allegations therein.

Upon either a mandatory or permissive dismissal, the district will promptly notify the complainant of the basis for the dismissal and provide the procedures to appeal the dismissal. If the dismissal occurs after the respondent has been notified of the allegations, then the district will also promptly notify the respondent of the dismissal, the basis for the dismissal and the complainant's opportunity to appeal. Notification of dismissal should be in writing and delivered simultaneously to the parties.

Dismissal of a formal complaint does not prevent the district from addressing allegations or taking action under another district policy, including but not limited to a different provision of the district code(s) of conduct.

Investigation

An investigator will be designated to investigate the allegations contained in the formal complaint or which are developed in the course of the investigation. In the event the district decides to investigate allegations about the complainant or respondent that are not included in the written notice, the district must provide notice of additional allegations to the parties and given them a reasonable opportunity to respond in writing to the new information or evidence.

The burden of gathering evidence and burden of proof must remain on the district—not on the parties. The following evidence will not be considered by the district and excluded as impermissible:

- Evidence that is protected under a privilege as recognized by federal or state law unless the person to whom the privilege or confidentiality is owed has voluntarily waived the privilege or confidentiality;
- A party's or witness's records that are made or maintained by a physician, psychologist or other recognized professional or paraprofessional in connection with the provision of treatment to the party or witness, unless the district obtains that party's or witness's voluntary, written consent for use in the district's grievance procedures; and
- Evidence that relates to the complainant's sexual interests or prior sexual conduct, unless the evidence about the complainant's prior sexual conduct is offered to prove that someone other than the respondent committed the alleged conduct or is evidence about specific incidents of the complainant's prior sexual conduct with the respondent that is offered to prove consent to the alleged sexual harassment. The fact of prior consensual sexual conduct between the complainant and respondent does not by itself demonstrate or imply the complainant's consent to the alleged sexual harassment or preclude determination that sexual harassment occurred.

The Investigator will endeavor to complete the investigation within 60 days. This timeline can be affected by one or both parties' right to have at least 10 days to review and respond to evidence and the draft investigative report or other good cause such as the unavailability of parties, party advisors, witnesses and evidence, concurrent law enforcement activity, or the need for language assistance or accommodation of disabilities.

In the investigation process, the Investigator will:

- Provide a party who is invited or expected, written notice of the date, time, location, participants, and purpose of all hearings, investigative interviews, or other meetings with sufficient time for the party to prepare to participate.
- Meet personally with the complainant (unless extraordinary circumstances prevent a personal meeting).
- Meet personally with the respondent (unless extraordinary circumstances prevent a personal meeting).
- Presume that the respondent is not responsible for the alleged conduct until a determination regarding responsibility is made.
- Provide an equal opportunity for the parties to present fact witnesses and other relevant evidence that is not otherwise impermissible.
- Not restrict either party's ability to discuss the allegations or to gather and present evidence.
- Provide the parties with the same opportunities to have others present during interviews or related proceedings to have others present during interviews or related proceedings, including an advisor.
- Collect any physical evidence.
- Meet personally with any witnesses (unless extraordinary circumstances prevent a personal meeting with one or more witnesses).
- Review any documentary evidence.
- Prepare a written report of the investigation that fairly summarizes the relevant evidence.

Party Review of Evidence and Report.

Parties and advisors will have an equal opportunity to review all evidence directly related to the allegations in the formal complaint (both exculpatory and inculpatory), including evidence upon which the district does not intend to rely in reaching a determination, and will be given at least 10 calendar days prior to the completion of the final investigation to meaningfully respond.

Parties and advisors will have the opportunity to review the investigative report and to issue a written response at least 10 calendar days before a hearing or determination of responsibility.

Hearing

Absent extraordinary circumstances, a non-live hearing will be held. After the district has sent the investigative report to the parties and before reaching a determination regarding responsibility, the Hearing Officer must afford each party the opportunity to submit written, relevant questions that a party wants asked of any party or witness, provide each party with the answers, and allow for additional, limited follow up questions from each party. Questions and evidence about the complainant's sexual predisposition or prior sexual behavior are not relevant unless such questions and evidence about the complainants prior sexual behavior are offered to prove that someone other than the respondent committed the conduct alleged by the complainant, or if the questions and evidence concerns specific incidents of the complainants prior sexual behavior with respect to the respondent and are offered to prove consent. The Hearing Officer must explain to the party proposing questions any decision to exclude a question as not relevant.

Determination

Within five working days of the conclusion of the hearing, the Hearing Officer will issue a written determination regarding responsibility, applying the preponderance of evidence standard (whether it is more likely than not a violation occurred), to the parties simultaneously by mailing the determination by certified mail or other agreed form of notice. Preponderance of evidence requires significantly less proof than beyond a reasonable doubt, which is required for a criminal prosecution.

The written determination will include:

- Identification of the allegations potentially constituting sexual harassment;
- A description of the procedural steps taken from the receipt of the formal complaint through the determination, including any notifications to the parties, interviews with parties and witnesses, site visits, methods used to gather other evidence, and hearings held;
- Findings of facts supporting the determination for each individual allegation;
- Conclusions regarding the application of the district's code of conduct to the facts;
- A statement of, and rational for, the result as to each allegation, including a determination regarding responsibility, any disciplinary sanctions the district imposes on the respondent, and whether remedies designed to restore preserve equal access to the district's education program or activity will be provided to the complainant;
- The district's procedures and permissible basis or bases for the complainant and respondent to appeal.

The determination becomes final either on the date that the district provides the parties the written determination of the result of the appeal if an appeal is filed, or if an appeal is not filed, the date on which an appeal would no longer be considered timely.

Appeal Procedures

A complainant or respondent may appeal the determination for any of the following reasons:

- Procedural irregularity that affected the outcome.
- New evidence that was not reasonably available at the time the determination or dismissal was made that could affect the outcome of the matter.
- The Coordinator, Investigator, or Hearing Officer had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that affected the outcome of the matter.

Appeals must be submitted in writing to the Superintendent within five (5) working days of receiving the decision and reference the reason(s) for the appeal as identified above with supporting argument(s). Failure to file an appeal within the prescribed time constitutes a waiver of any right to an appeal.

When an appeal is filed, the district will notify the non-appealing party in writing.

The Superintendent, or designee if Superintendent was Hearing Officer, Investigator, or Coordinator, will review the record of the original hearing, including documentary evidence and give each party a reasonable, equal opportunity to submit a written statement in support of or challenging, the outcome.

It is the Superintendent's (or designee's) discretion to affirm, overturn, or modify the determination. The Superintendent/designee may convert any sanction imposed to a lesser sanction, to rescind any previous sanction, or to return a recommended sanction to the original Hearing Officer for review/or reconsideration. If there is new evidence (unavailable at the time of the hearing through no fault of the parties) which is believed to substantially affect the outcome, or evidence presented at the previous hearing was "insufficient" to justify a decision, or a finding that a substantial procedural error resulting in prejudice occurred, the matter may be remanded for either a rehearing of the entire matter or reconsideration of specific issues. If remanded to the original Hearing Officer, either or both parties may appeal the Hearing Officer's decision to the Superintendent/designees and the procedures set out above shall control the appeal.

Appeal Decision. The final decision will be communicated in writing by the Superintendent to both parties describing the result of the appeal and the rationale for the result. The decision will be communicated to both parties simultaneously within ten (10) working days of receiving the appeal request.

TITLE IX - SEX DISCRIMINATION AND SEXUAL HARASSMENT (Continued)

4004

The decision of the Superintendent or designee on appeal shall be final.

Informal Resolution

An informal resolution to a complaint is available in some circumstances. Informal resolutions are unavailable unless a formal complaint of sexual harassment is filed. Informal resolutions may be entered into any time prior to determining whether sexual harassment occurred. Informal resolution may include conflict resolution or a restorative agreement between the parties with a trained Title IX Officer presiding over the informal resolution conference. Participation in informal resolution is never mandatory and will only take place with the full written consent of both parties involved. The district may, in its sole discretion, decline to offer an informal resolution in certain circumstances.

Before informal resolution may be commenced written notice to the parties must be provided, disclosing the allegations and the requirements of the informal resolution process including when an informal complaint would preclude the parties from resuming a formal complaint arising from the same allegations.

No appeal is available from an informal resolution, but at any time prior to agreeing to a resolution, any party has a right to withdraw from the formal resolution process and resume the grievance process, and any consequences resulting from participating in the informal resolution process including the records that will be maintained or could be shared. Further, if the parties are unable to agree on a voluntary resolution, the matter will be referred by the Title IX Coordinator to a Title IX Hearing. No offers to resolve the conflict that were made or discussed during the informal voluntary resolution process may be introduced during the Title IX Hearing.

Outcomes

If it is determined under the preponderance of evidence standard (more likely than not to have occurred) that the respondent is not responsible for a violation of this policy, the complaint will be dismissed.

If it is determined under the preponderance of evidence standard that a respondent is responsible for sexual harassment under the jurisdiction of this policy, the Title IX Coordinator will 1) coordinate remedies to complainant and other persons identified having had equal access limited by the discrimination; 2) coordinate disciplinary sanctions on the respondent including notification to complainant; and 3) take other appropriate, prompt and effective steps to ensure sex harassment does not continue or reoccur.

The following sanctions may be considered where a respondent is found responsible for sexual harassment. The sanctions below are not intended to be exclusive; actions may be imposed singularly or in combination when a violation of this policy is found.

Student Respondent.

- **Restriction** – A limitation on privileges for a period of time and may include but not be limited to, the denial of the use of facilities or access to parts of campus, denial of the right to represent the district, or denial of participation in extracurricular activities.
- **Service Project** – Community service or an education class or project beneficial to the individual and campus or community.
- **Probation** – A specified period of time during which the student is placed on formal notice that he/she is not in good social standing with the district and that further violations of district policies will subject the student to suspension from school.

Suspension – If warranted by the severity of the incident, removal from classes and other privileges or activities for a definite period of time not to exceed the remainder of the semester in which the incident occurred and the following semester and until the conditions which are set forth in the hearing outcome letter are met. Students who are suspended from the district are not permitted on campus or in campus buildings, facilities or activities at any time for any reason during the period of suspension, unless otherwise directed by Superintendent or designee. Conditions to conclude a suspension and reinstatement process will be stated in the written notification. Notation on the student's transcript will not be made; however, a permanent record of the action will be maintained in the student's record.

- Long-term Suspension – Suspension of student for an indefinite period not to exceed the maximum period permitted by law, typically reserved for a sexual violence/assault finding. The conditions for readmission, if any, shall be stated in the hearing outcome letter. In addition, a student, though readmitted to the school by operation of law, may be denied the opportunity to participate in extracurricular activities for as long as the student is enrolled in the district. Notation on the student's transcript will not be made; however, a permanent record of the action will be maintained in the student's record. Removal should be reserved and used only in cases involving the most severe instances of misconduct.

Employee Respondent.

Employees found to have violated this policy will be subject to sanctions up to and including dismissal from employment.

Retaliation

Retaliation against an individual for reporting or participating in the Title IX grievance process is strictly prohibited. Retaliation in this context means intimidation, threats, coercion or discrimination for the purpose of interfering with any right or privilege secured by Title IX. Retaliatory conduct includes filing a charge against an individual for code of conduct violations that arise out of the same facts or circumstances or a report or formal complaint of sexual harassment if done so in bad faith. Complaints alleging retaliation may be filed pursuant to the grievance process included herein, and sanctions may be imposed against an individual determined responsible for retaliation in accordance with this policy.

Nothing in this definition or this policy precludes the district from requiring an employee to participate as a witness in, or otherwise assist with, an investigation, proceeding, or hearing under this policy.

Designees

The designation of a district official responsible for prescribed actions under this policy shall automatically include the official's designee in instances where an official is unable, unavailable or it appears that the official may have a conflict of interest that causes the official to recuse from involvement in the matter. The official's designee shall have the same authority as the official in matters involving this policy.

Availability of other Complaint Procedures

In addition to seeking criminal charges through local law enforcement, members of the district community may also file complaints with the following entities regardless of whether they choose to file a complaint under this procedure:

Office for Civil Rights

400 Maryland Avenue, SW

Washington, D.C. 20202-1100

Customer Service Hotline: (800) 421-3481

Email: OCR@ed.gov

TITLE IX - SEX DISCRIMINATION AND SEXUAL HARASSMENT (Continued)

4004

Office for Civil Rights:

Kansas City Field Office: OCR.KansasCity@ed.gov, (816) 268-0550;

Washington D.C.: OCR@ed.gov 1-800-421-3481

Equal Employment Opportunity Commission:

Oklahoma City Field Office: 1-800-669-4000;

Washington D.C.: 1-800-669-4000, Eeoc.gov/contact

Distribution

The district shall: prominently display on its website the required contact information for the Title IX Coordinator; post training materials used to train Title IX Coordinators and related Title IX Officials, Investigators, and Hearing Officers on its website; and notify applicants for employment, parents or legal guardians of elementary and secondary school students, and employee organizations—of the name or title, office address, electronic mail address, and telephone number of the Title IX Coordinator.

Adoption Proposed 11/10/25

CERTIFIED, SUPPORT, AND NON-ADMINISTRATIVE PERSONNEL EXEMPT FROM BARGAINING UNITS

Leave of absence policies applicable to certified and support employees are outlined in the UCTA and USPA master contracts. **Curriculum Specialists** **District Wide Teacher Trainers** are subject to the UCTA leave of absence policy and Business Support Associates are subject to the USPA leave of absence policy.

ADMINISTRATORS

An administrator may, upon application to the Superintendent or designee and with approval of the Board of Education, be granted a leave of absence without pay for the specific reason(s) outlined below for a period of up to one year, provided it is considered to be in the best interest of the district.

Requests of administrators for leave of absence may be granted for the reason of personal health or illness. Requests for medical leave shall be accompanied by a doctor's certification verifying the need for medical leave. The employer may periodically request recertification of medical necessity for leave. Said requests shall be submitted as soon as the need for the leave is anticipated, but at least one month prior to the date requested (unless an emergency exists) setting forth the reason for leave, the length of such leave and the expected date of expiration of leave. The administrator will be required to provide a medical release prior to returning from leave.

The Superintendent may consider other urgent reasons for a leave of absence of an administrator, but may deny any leave of absence if it is not in the best interest of the district for any reason. Due to administrator responsibilities being difficult to cover on a temporary basis, the intent of this leave policy would not include leaves for non-urgent reasons, such as to pursue education, to travel, for child rearing, or other purposes deemed to be of a more routine/optional nature. Leaves of absence for administrators must be specifically approved by the Superintendent. Reasons for denial could include, but are not limited to, inability to cover the responsibilities of the administrator while he/she is on leave, major initiatives underway at the time of the request, and/or other reasons making the approval of the leave request not in the best interest of the district.

Administrators shall not return from leave prior to the date of expiration specified on the leave request without the Superintendent's approval. Administrators granted a leave of absence of less than one year, and the leave of absence ends during the same contractual year may return during the contractual year to their same positions. An administrator returning from a leave the next contractual year may be rehired in a position in the district provided the administrator complies with all requirements of his/her reemployment, but is not guaranteed the same position upon rehire.

Although efforts will be made to locate a similar position in which to rehire the administrator after the leave of absence expires, if the position held by the administrator before he/she went on leave of absence has been eliminated due to budget cuts, reduction of grant funding, reduction of a program, or other reason, the administrator may not be rehired and, if approved for a leave of absence, the administrator accepts this risk of non-reemployment.

Nothing in this policy will interfere with the right of an administrator to use his/her available sick leave nor negate any right under the Family Medical Leave Act.

An administrator returning from a leave the next fiscal year may be rehired into a position provided the administrator complies with all requirements of his/her re-employment.

Revised 6/10/96

Revised 12/8/97

Revised 1/8/01

Revised 12/8/03

Revised 12/13/04

Revised 1/16/06

Revised 12/10/07

Revised 12/14/15

Revision Proposed 11/10/25

UCTA 4081

In order to assure the district continues to be in full compliance with the Fair Labor Standards Act (FLSA) and any other applicable state laws governing wage and hour requirements, employees must comply with the directives outlined below. The term “hourly” as used in this policy shall mean an employee who is not exempt from the wage and hour provisions of FLSA.

WAGE & HOUR ISSUES REGARDING HOURLY EMPLOYEES

Administrators and supervisors must make every effort to minimize overtime work (work in excess of 40 hours per workweek) for hourly employees. Hourly employees must make every effort to complete their work without exceeding 40 hours in the workweek and are required to seek pre-authorization from the appropriate administrator to work hours in excess of 40 hours per workweek.

If an administrator or supervisor wishes to utilize an employee from another department/division for provisional work that will cause the employee to exceed 40 hours in the workweek, the administrator or supervisor should coordinate with the administrator of the other department/division to minimize the overtime implications of the provisional work.

An employee will receive compensatory time at time-and-a-half per hour of overtime worked in lieu of overtime pay. All compensatory time must be used by fiscal year end or all time will be paid out by fiscal year end. Accrued compensatory time will be applied before any personal or vacation time is used.

If the employee and immediate supervisor opt for exchange time off, a record of all exchange time earned and used will be maintained in the electronic timekeeping system. Exchange time must be used in the work week (Sunday through Saturday) earned hour for hour. An example of exchange time is working one extra hour on day one of the work week (Sunday through Saturday) in exchange for missing one hour on day three of the same work week.

Hourly employees are not to be issued/assigned district laptop computers, nor shall the district facilitate the receipt of e-mail on an hourly employee's phone, PDA or other hand-held device. Exceptions due to essential duties of an employee's job may be considered and authorized on a case-by-case basis by the Executive Director of Human Resources so that appropriate wage and hour considerations can be analyzed and communicated.

An hourly employee, when pre-authorized in writing by the appropriate administrator, may check out (for a limited period of time) a laptop computer for a particular, short-term, authorized work purpose (with all work time to be recorded and submitted appropriately).

Under circumstances where access to e-mail is available to an hourly employee outside of the regular work day (through whatever means, whether by work computer, home computer, laptop computer, cell phone, PDA, etc.), the employee must seek prior written authorization to utilize these resources outside of regular work hours and must record any and all time spent reading and/or responding to district business e-mail and performing other district work with the aid of such equipment.

REQUIREMENTS APPLICABLE TO HOURLY EMPLOYEES

Hourly employees must accurately record and submit all time worked on behalf of the district by using the district's electronic time system or by a timesheet. Time must not be over-reported or under-reported.

Hourly employees must not work outside of the individual employee's regular work hours without prior authorization of their administrator. Work not permitted outside regular work hours (without specific administrator pre-authorization) would include making or receiving business phone calls, reading and/or sending business e-mails (whether by computer, phone or other device); organizing, reviewing or preparing business documents; shopping for supplies on behalf of the district; and other business activities related to the employee's job.

In most circumstances, hourly employees should be performing work during times when a supervisor or administrator is present at the work site. Exceptions for the specific job role, such as security officer or other approved role, or for a specific, urgent one-time need, must be approved by the administrator.

Hourly employees must not work from home without prior written authorization of the Executive Director of Human Resources. Under the unusual circumstance where the Executive Director of Human Resources has pre-authorized an hourly employee to work at home, the employee must record and submit the exact time he/she spent performing the authorized work. Work not permitted from home (without written pre-authorization of the Executive Director of Human Resources) would include making or receiving business phone calls, reading and/or sending business e-mails (whether by computer, phone or other device); organizing, reviewing or preparing business documents; and other business activities related to the employee's job.

Hourly employees who do not obtain written pre-authorization to work outside of regular work hours or written pre-

authorization to work from home, but who perform such work anyway, must record and submit the exact amount of time spent working, even though not pre-authorized in writing.

Hourly employees are prohibited from volunteering to do work for the district in any capacity that is similar to the individual employee's regular job duties.

Hourly employees who work in excess of 40 hours in a given workweek will receive compensatory time at the rate of one and one-half hours per hour worked in excess of 40 hours in that workweek (pursuant to the agreement with the bargaining unit). Paid or unpaid leave days and holidays do not count as hours worked in the workweek.

Hourly employees will receive compensation for all hours worked, either by wages or by compensatory time (when applicable).

Hourly employees must make every effort to use compensatory time by June 30 of each fiscal year. Compensatory time remaining on June 30 of each year will be paid out to the employee.

ADMINISTRATORS AND SUPERVISORS

Administrators and supervisors must not allow or permit hourly employees to work "off the clock." Administrators and supervisors must require that all work performed by hourly employees on behalf of the district be accurately recorded and submitted.

Administrators and supervisors will carefully review time records of their hourly employees to determine that all hours worked by employees have been accurately recorded.

Administrators must require hourly employees to request written pre-authorization to work outside of regular work hours.

Administrators are to prohibit hourly employees from working at home, except in extraordinary circumstances where the Executive Director of Human Resources has pre-authorized in writing that the hourly employee may work from home for an urgent/extraordinary reason. After the Executive Director of Human Resources has pre-authorized in writing the work from home, the administrator must monitor that such work time is accurately recorded and submitted by the hourly employee.

Administrators and supervisors must monitor, to every extent possible, whether hourly employees are taking work home, responding to e-mail at home, answering business phone calls at home or otherwise working outside of regular work hours, and must monitor that such work time is accurately recorded and submitted (to the extent it can be ascertained by the administrator or supervisor that such work has occurred).

Even if work time is not authorized by the administrator or supervisor, when the administrator or supervisor knows work has been performed by the hourly employee on behalf of the district, the administrator or supervisor must ensure that such work time is recorded and submitted as hours worked.

DISCIPLINARY ACTION UNDER THIS POLICY

Disciplinary action, up to and including termination of employment, may occur for any violation under this policy, including for the following reasons:

Failure of an hourly employee to accurately record all time worked.

Failure of an hourly employee to seek prior written authorization from his/her administrator for work performed outside of normal work hours or to seek prior written authorization from the Executive Director of Human Resources for work performed at home.

Failure of an hourly employee to refrain from working hours that have not been pre-authorized in writing by his/her administrator.

Any suggestion or directive by an administrator or supervisor to an hourly employee that would cause an hourly employee to believe that he/she should not record all of his/her work time on behalf of the district (whether authorized work time or non-authorized work time).

Adopted 11/10/08

Revised 11/8/10

Revised 12/9/13

Revised 12/14/15

Revised 12/11/17

Revision Proposed 11/10/25

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DEPARTMENT OF HUMAN SERVICES, LAW ENFORCEMENT, 5016 MENTAL HEALTH PROVIDER INTERVIEWS ON SCHOOL PREMISES

In accordance with Oklahoma law, ~~teachers and other district employees are required to~~ all district employees are mandated reporters and shall report to the Department of Human Services any suspected cases of ~~physical~~ abuse, ~~or neglect, or exploitation~~ involving students. The Board of Education fully supports that requirement and has established this policy to facilitate such reporting.

The following reporting procedures are to be implemented by all Union Public School personnel:

Notification to the Department of Human Services of child abuse should be made by telephone, in writing, or in person. The following provisions are stipulated:

- A. Any report must be made in good faith.
- B. No privilege or contract shall relieve any person from the requirement of reporting.
- C. No employer, supervisor, or administrator shall impede or inhibit the reporting obligations.
- D. No employer, supervisor, or administrator shall retaliate against a person who, in good faith, provides child abuse reports or information, or who testifies in a proceeding regarding child abuse.

Requirements:

- A. DHS may conduct an interview and examination of the child at any reasonable time and at any place including, but not limited to, the child's school. School personnel will obtain documentation of the name and identification of DHS personnel conducting the interview. If requested by a DHS representative, an administrator may be present during an interview.
- B. Any DHS records must be kept in a confidential file in the principal's office and transmitted in the same manner as special education records and are subject to FERPA policy.
- C. Access to such records may be made available by the principal to a person designated to assist in the treatment of, or with services provided to, the child.
- D. These records must be destroyed when the child reaches eighteen years of age.
- E. Whenever a child transfers from one school district to another, the building principal must forward to the receiving school all reports of sexual abuse and severe physical abuse received from DHS.
- F. The building principal must also notify DHS of the child's new school and address, if known.
- G. All DHS reports should be reported to the Director of Security by the principal and the Director of Security will inform Law Enforcement.

State statutes on child abuse reporting require all of the following to report promptly to the county office of the Department of Human Services in the county in which the suspected injury occurred:

- A. Physician or surgeon, including doctors of medicine and dentistry, licensed osteopathic physician, residents and interns, examining, attending, or treating a child under the age of eighteen;
- B. Registered nurse examining, attending, or treating such a child in absence of a physician or surgeon;
- C. Teacher of any child under the age of eighteen;
- D. Other person having reason to believe that a child under the age of eighteen years has had physical injury or injuries inflicted upon him/her by other than accidental means where the injury appears to have been caused as a result of physical abuse, sexual abuse, or neglect.

It is a misdemeanor for any person to knowingly and willfully fail to promptly report any incident of suspected abuse. The person who has direct information about the abuse, or the person in whom the child has confided, is responsible for filing the report within 48 hours. The report must contain the following information:

- A. Child's name, birth date, school, grade.
- B. List of sibling(s).
- C. Name of adult(s) with whom child resides.
- D. Parent/guardian's name, address, phone number, place of employment, and work phone number.
- E. Nature and extent of child's injury, including any evidence of previous injuries.
- F. Description of circumstances.
- G. Documentation of the school nurse's examination of the injuries.
- H. Documentation of the name of the DHS personnel contacted, date, and time of contact.

DEPARTMENT OF HUMAN SERVICES, LAW ENFORCEMENT, 5016 MENTAL HEALTH PROVIDER INTERVIEWS ON SCHOOL PREMISES (Cont.)

- I. Documentation of the name and badge number of the police officer, if the child requires transportation to shelter or a physician.
- J. Signatures of school personnel filing report.

The Child Abuse Reporting form is available at each site.

Any person participating in good faith and exercising due care in the making of a report, or any person allowing access to a child by a person authorized to investigate a report concerning the child, shall have immunity from any liability, civil or criminal, that might otherwise be incurred or imposed. Any such participant shall have the same immunity with respect to participation in any judicial proceeding resulting from such report.

Any person who knowingly and willfully makes a false report, or makes a report that the person knows lacks factual foundation, may be reported by the Department of Human Services to local law enforcement for criminal investigation and, upon conviction thereof, shall be guilty of a misdemeanor.

LAW ENFORCEMENT

Should it become necessary for a properly identified member of a law enforcement agency to talk to a student and/or school personnel during the school day, the following procedures should be observed to assist law enforcement officers and to protect the rights of pupils and parents:

- A. All properly identified law enforcement personnel will coordinate all business through the principal's office or the security director's office.
- B. If requested by a law enforcement officer an administrator or designee may be present during an interview.
- C. School personnel will obtain documentation of the name and badge number of law enforcement officers at the time of the interview.

MENTAL HEALTH PROVIDERS

- A. Except with prior permission of the Superintendent, third party mental health providers may not conduct student interviews or provide therapy to a student during school hours or on school property unless specified on a student's Individual Education Plan (IEP) program.

Revised 6/10/96

Revised 12/8/97

Revised 12/13/99

Revised 12/12/11

Revised 12/9/13

Revised 12/14/15

Revised 12/10/18

Revised 12/13/21

Proposed Revision 11/10/25

OBSERVATION OF MINUTE OF SILENCE, FLAG DISPLAY, AND PLEDGE OF ALLEGIANCE

5026

OBSERVATION OF MINUTE OF SILENCE

The Oklahoma Legislature has directed that the board of education of each school district shall ensure that the public schools within the district shall observe approximately one minute of silence each day. This policy is adopted to comply with that directive.

The principal of each school building within the school district is hereby directed to designate approximately one minute of each day for the observation of a minute of silence. At the beginning of each semester, the principal or his or her designee will give teachers direction as to how the minute of silence is to be observed. The minute of silence shall be for the purpose of allowing each student and teacher, in the exercise of his or her individual choice, to reflect, meditate, pray, or engage in any other silent activity that does not interfere with, distract, or impede other students and teachers in the exercise of their individual choices. Teachers shall neither encourage students to use nor discourage students from using the minute of silence for any particular purpose, such as reflection, meditation, prayer, or other silent activity. All teachers shall be made aware that it is the student's decision as to how to utilize the minute of silence, provided that the student's choice does not interfere with, distract, or impede other students in the exercise of their individual choices.

The daily minute of silence will begin with an announcement over the public address system that there will be a pause for a minute of silence in which students and teachers may reflect, meditate, pray, or engage in any other silent activity that does not interfere with, distract, or impede other students in the exercise of their individual choices.

Reports of violations must be submitted in writing by the complaining party to the principal of the school building where the violation occurred. The district will investigate all reports that a student or teacher has not been permitted to observe approximately one minute of silence each school day pursuant to this policy.

DISPLAY OF THE UNITED STATES FLAG

The United States flag shall be prominently displayed on the grounds of each school building. Traditional customs and practices of displaying the flag shall be observed. The district shall conduct appropriate instructional activities to acquaint students with traditional customs and practices related to the display of the flag of the United States of America and the respect which should be observed during appropriate ceremonies related to raising and lowering of the flag and the salute to the flag. **Students are allowed to display the United States Flag.**

PLEDGE OF ALLEGIANCE

Students shall recite the pledge of allegiance to the flag of the United States of America at least once every school week. Each student shall be informed by posting a notice in a conspicuous place that students not wishing to participate in the pledge shall not be required to do so.

Reference: 70 OKLA. STAT. §11-101.2
O.A.C. 210: 35-3-5
O.A.C. 210: 35-3-252
70 O.S. § 24-106

Adopted: 10/14/24

Revised 12/9/24

Adopted: 4/14/25

Proposed Revision 11/10/25

Strong Readers Act

The District shall implement a comprehensive early literacy initiative in compliance with the Strong Readers Act, adopted 2024. This includes:

- Screening and progress monitoring of student reading proficiency,
- Evidence-based reading instruction and interventions,
- Professional development for staff, and
- Data collection and reporting as required by the Act.

All students in grades K–3 will be assessed three times a year using a State Board of Education-approved screening instrument to evaluate reading skills such as phonological awareness, decoding, fluency, vocabulary, and comprehension. This will help the District identify students with reading deficiencies, including those showing characteristics of dyslexia that lead to or cause reading difficulty.

A student enrolled in kindergarten, first, second, or third grade with an identified deficiency in reading at any time based upon the screening instrument shall receive a Student Literacy Intervention Plan (SLIP) no later than thirty (30) days after the identification of the deficiency in reading. The reading intervention plan shall be provided in addition to core reading instruction that is provided to all students.

The reading intervention plan for each student identified with a deficiency in reading shall be developed by a Student Proficiency Team and shall include supplemental instructional services and supports. Each Team shall be composed of:

- a. the parent or legal guardian of the student,
- b. the teacher assigned to the student who has responsibility for reading instruction in that academic year.
- c. a teacher who is responsible for reading instruction and is assigned to teach in the next grade level of the students, and
- d. a certified reading specialist or an individual with advanced training or specialization in literacy instruction, if one is available.

The reading intervention plan shall:

1. a. Describe the research-based reading intervention services the student will receive to remedy the deficiency in reading,
2. b. Provide explicit and systematic instruction in phonological awareness, decoding, fluency, vocabulary, and comprehension as applicable,
3. c. Monitor the reading progress of the student's reading skills throughout the school year and adjust instruction according to the student's needs, and
4. d. Continue until the student is determined to meet grade-level targets in reading based on screening instruments or assessments.

Dyslexia Screening

Any student enrolled in kindergarten, first, second, or third grade who is assessed through the Strong Readers Act and who is not meeting grade-level targets in reading after the beginning-of-the-year assessment shall be screened for dyslexia. Screening also may be requested for a student by his or her parent or legal guardian, teacher, counselor, speech-language pathologist, or school psychologist. Screening shall be conducted in accordance with the policies developed by the State Board of Education and the Oklahoma Dyslexia Handbook, including policies and information developed relating to universal screening of kindergarten students for characteristics of dyslexia.

For any student granted an exemption from the screening requirement, the district shall maintain ongoing evidence of student progression toward English language acquisition with the same frequency as administration of screening assessments. Evidence may include, but not be limited to, student progression toward OAAP reading essential elements, proficiency in sign language and reading comprehension, and proficiency in Braille and reading comprehension.

Reporting Requirements

The district shall annually publish on the school website, and report electronically to the State Department of Education, the Office of Educational Quality and Accountability, and the Secretary of Education by September 1 of each year the following information on the prior school year:

- a) expenditures related to implementing the provisions of this policy, the number of staff implementing the provisions of this policy, and average daily classroom time devoted to implementing the provisions of this policy,
- b) by grade, the number and percentage of all students in kindergarten through third grade who did not meet grade-level targets based on a screening instrument administered pursuant to this policy,
- c) by grade, the number and percentage of all students in kindergarten through third grade who have been enrolled in the district for fewer than two (2) years,
- d) by grade, the number and percentage of students in kindergarten through third grade who demonstrated grade-level proficiency based on a screening instrument administered pursuant to this policy, and
- e) by grade, the number and percentage of students in kindergarten through third grade who are on an individualized education program (IEP) in accordance with the Individuals with Disabilities Education Act (IDEA) and who demonstrated grade-level proficiency based on a screening instrument administered pursuant to this policy or an alternative assessment prescribed by the student's IEP.

Copies of the results of the screening instruments administered shall be made a part of the permanent record of each student.

Reference: ~~70 O.S.~~ **OKLA.STAT. tit. 70** §1210.508A, et seq.

OKLA.STAT.tit.70 § 1210.520

Adopted 8/11/2025

Proposed Revision 11/10/25

INCLUDING STUDENTS WITH DISABILITIES IN STATE 5037 AND DISTRICTWIDE ASSESSMENTS

The Individuals with Disabilities Education Act (IDEA) and the Every Student Succeeds Act (ESSA) of 2015 requires school districts to include students with disabilities in state and districtwide assessments with appropriate accommodations where necessary (34CFR 300.18). This would include all state and district criterion-referenced (CRT) and norm-referenced (NRT) tests.

School districts are required to assess students with disabilities as frequently and in the same manner as they do students without disabilities. Therefore, to the extent the district or state requires student participation in assessments, students with disabilities will be included in the assessment or provided an alternative method of assessment.

The Section 504/Title II team for each student with a disability (collectively referred to as the “Team”) will make the decision regarding his or her participation in regular districtwide assessment on an individual basis, considering his or her unique needs.

The Individual Education Plan (IEP) team will be responsible for identifying the extent of participation in the assessment process and in specifying the testing accommodations. These determinations will be documented in the IEP. All students with disabilities who actively participate in the general education curriculum will be expected to participate in the state and districtwide assessment program with or without appropriate accommodations:

Options for participation include:

- A. Participation without accommodations;
- B. Participation in all subtests (content areas) or specific subtests of the assessment instrument with appropriate accommodations, as needed;
- C. Participation in specific subtests of the CRT/NRT with appropriate accommodations and alternate assessment for the remaining content area;
- D. Participation in the alternate assessment for all content areas as allowed by state law.

Students with the most significant cognitive disabilities, may participate in the Oklahoma Alternate Assessment Program (OOAP) (34CFR & 200.6(d)(1). The alternate assessment is designed to measure progress toward IEP goals at the student's instructional level in the same academic areas as students in the general education curriculum. The alternate achievement of the content standards is required in daily instruction as well as statewide assessment and the performance expectations aligned with the statewide general assessment are not appropriate even with the accommodations.

Assessment decisions are made on an annual basis by the IEP team and students must meet certain criteria to be eligible for an alternate assessment. The IEP team determines that a student with disabilities will not participate in the state and districtwide assessment process. It will document why participation is not appropriate and identify the alternate assessment procedure and instrument that will be utilized to measure student progress. The only appropriate justification for a student to not participate in the state and districtwide assessment program is when the IEP team determines that even with accommodations, the student would be unable to demonstrate at least some of the knowledge and skill tested through the state and districtwide assessment.

The district's alternate assessment procedures will include, but not be limited by, the utilization of standardized developmental checklists, off-grade standardized testing in specific content area, and the Oklahoma Criteria Checklist for Assessing Students with disabilities on Alternate Assessments.

The Section 504/Title II team for each student with a disability (collectively referred to as the “Team”) will make the decision regarding his or her participation in regular districtwide assessment on an individual basis, considering his or her unique needs.

Generally, an IEP Team shall meet to make such a determination after providing notification to the student's parent/guardian at least five days in advance (or earlier if mutually agreed by the district and parent/guardian). Such notification must indicate the purpose, date, time and location of the meeting and who, by title or position, will attend the meeting. The determination is based on criteria determined by the Oklahoma State Department of Education (OSDE).

Regular Districtwide Assessment

To make these determinations, Team members will be knowledgeable about the child's present level of educational performance and measurable annual goals; the general or alternate curriculum; the format and content of the assessment; and the alignment between the curriculum and the academic content standards assessed by the assessment.

INCLUDING STUDENTS WITH DISABILITIES IN STATE 5037 AND DISTRICTWIDE ASSESSMENTS (Continued)

Based on a review of relevant information, the members of the Team will determine whether and how the student will participate in the assessment. For those students who are identified as needing accommodations, the Team will document in either the IEP or Section 504/Title II Plan which accommodations are necessary for the child to participate in the assessment. The Team may determine that the student can participate in some portions of the assessment without accommodations and identify accommodations for other portions of the assessment.

Alternate Assessment

The Team will not determine that participation in an alternate assessment is necessary based primarily upon poor attendance; English language learner status; social, cultural or economic differences; disruptive behavior; student reading level; expectations of poor performance; amount of time receiving special education services; low achievement in general education; categorical disability label; performance tied solely to a level, label or cut score; or the location where the child receives services. If the Team determines that student participation in an alternate assessment is necessary, the team will specifically identify the alternate assessment to be utilized on the IEP or Section 504/Title II Plan. The Team will select a mode of alternate assessment that measures the same content area(s) as the districtwide assessment.

A parent has the right to opt out of the Oklahoma Alternate Assessment Program (OAAP) by declining parent consent on an OSDE form. In such an event, the student will not be assessed using the OAAP, and the student will be administered the assessment given to regular education students for that grade level.

Students will not be required to participate in OAAP without a completed parental consent form as adopted by the Oklahoma State Department of Education. The district may proceed in requiring the student to participate in OAAP without parental consent in the following cases:

1. After documenting reasonable efforts to obtain parent/guardian consent and the parent/guardian has failed to respond; or
2. The district obtains approval through a due process hearing in accordance with 34 CFR § 300.506 et seq.

Reference: Okla. Stat. tit. 70, § 16-114.6.

TESTING ACCOMMODATIONS

Testing accommodations are changes in the way a test is administered. Testing accommodations are intended to offset distortions in test scores caused by a disability without invalidating or changing what the test measures. The IEP team will determine the appropriate testing accommodations for each student with a disability. Testing accommodations are not permitted unless specified on the student's IEP and allowable by state law. Only accommodations that do not invalidate the test results may be utilized. Appropriate testing accommodations should not change or replace the skills that the test targets or is designed to measure. Classroom accommodations that have been identified on the IEP will be permissible as testing accommodations as long as these accommodations do not invalidate the testing instrument.

Types of testing accommodations which are acceptable are outlined annually in the OSTP Accommodations for Students with an IEP or 504 Plan:

Invalidation of a test score means that changes in the test presentation, content or response format have resulted in changes in what the test measures. Therefore, the inference made from a given test score is inaccurate.

Accommodations that have the potential to invalidate a test score include:

- A. Reading a reading test to the student;
- B. Using a calculator on a mathematics test that is designed to measure mental computation;
- C. Using spelling tools on writing or language arts tests that score the correctness of spelling;
- D. Paraphrasing that changes the meaning of the text or consistently makes the material easier to read or comprehend;
- E. Requesting additional time to test beyond the timelines specified by the Oklahoma State Department of Education.

Allowances and restrictions for the use of cellular phones and/or wireless telecommunications devices by students while in school buildings during school hours or while the student is in transit to or from school on a school vehicle will be determined by school site dependent upon cellular service being available. Unless otherwise noted in the student handbook or through written communication to the parents from the principal, the use of such devices is prohibited except with the prior written consent of both the parent/guardian of the student and the school principal.

~~To obtain the administration's consent, the parent/guardian must present a written request that the student be allowed to use a cellular phone and/or wireless telecommunications device due to safety or medical necessity. A medical necessity must be verified by a practicing physician.~~

Excepted from the prohibition on student use of cell phones and personal electronic devices on campus, are the following situations:

- 1. Emergency use of cell phones or personal electronic devices by students during the school day;**
- 2. Use of cell phones or personal electronic devices by students who use them to monitor health issues.**
- 3. As may be required by a student's disability pursuant to a state or federal law; and**
- 4. School-issued or school-approved devices that are specifically limited for use in classroom instruction.**

The written consent for use of a cellular phone and/or wireless telecommunications device shall be maintained in the student's file. Teachers shall be notified of those students who are authorized to use a cellular phone and/or wireless telecommunications device. Cellular coverage cannot be guaranteed for all locations in all buildings.

A student found to be in violation of this policy may be disciplined according to Board Policy #5050.

Revised 6/10/96

Revised 12/8/97

Revised 12/14/98

Revised 6/11/01

Revised 12/13/04

Revised 1/18/10

Revised 12/14/15

Revised 12/11/23

Proposed Revision 11/10/25

STUDENT DRESS AND PERFORMING GROUPS AND GRADUATION ATTIRE

5060

While the mission of Union Public Schools is to educate its students, there is a close relationship between high standards of dignity and pride and proper grooming. It is important that dress contribute to the atmosphere of a good educational environment. It is hoped that a minimum amount of time and effort is spent on enforcement; however, it is the responsibility of the student and the parent to adhere to these guidelines. Exceptions to this policy are at the discretion of the building principal. There may be clothing, hairstyles, and/or accessories not specifically addressed herein that might be so disruptive to the educational process that the building principal may need to take immediate corrective action. In those cases requiring such action, the building principal may act immediately.

General Guidelines:

- A. Modesty will be the dominant feature in all clothing.
- B. Clothing must be clean and safe.
- C. Clothing, hairstyles and/or accessories must not be revealing, disruptive, or distract from the educational process in any way.
- D. Clothing must not be derogatory to any individual, group, or institution, including hate-group messages.
- E. All students are required to wear clothing including shoes which are safe and appropriate for school activities.
- F. Hair is to be well-groomed and clean.
- G. Coats and/or outerwear may not be worn during the school day except at the discretion of the classroom teacher (dependent on classroom conditions) or the administration.
- H. One-piece swimsuits must be worn while using the pool.
- I. Shorts, dresses or skirts must be longer than the tip of the longest finger with arms fully extended against the leg (no tears, cuts or holes in garments above this point are acceptable).
- J. Tattoos which violate Board policy must be covered so they are not visible.

Unacceptable Clothing and Accessories:

- A. Dresses, shirts or blouses that only partially cover the shoulders (no tank tops and no halter tops).
- B. Low-cut shirts or blouses; shirts which expose the midriff or full back; and pants, skirts or other clothing which expose the midriff.
- C. Any clothing which reveals undergarments.
- D. Slacks, pants or shorts worn below the hip.
- E. Caps, hats, hoods or other head covering in the building.
- F. Clothing and or accessories which carry messages either written or suggesting the promotion of illegal substances including, but not limited to, drugs, alcohol, tobacco products; vulgar language, sex, violence, gang-related affiliation or other symbols that detract from the learning environment.
- G. Gang-related attire (colors, bandannas, shoelaces, symbols, belts/buckles, jewelry, etc.)
- H. Bedroom attire (pajamas, lounge pants, slippers, etc.)
- I. Jewelry with spikes, electronic jewelry, or items worn as jewelry which are not intended to be worn as jewelry.
- J. Collars intended for use on animals.
- K. Chains, including wallet chains or collars.
- L. Excessive or distinctive makeup.
- M. Sheer shirts covering unacceptable clothing.
- N. Cleated or steel-toed shoes or boots.
- O. Sunglasses.

STUDENT DRESS AND PERFORMING GROUPS ~~AND GRADUATION~~ ATTIRE (Continued)

5060

PERFORMING GROUP UNIFORM GUIDELINES

Uniforms used by parent- or school-sponsored groups will be selected by the sponsor with approval by the principal or director responsible, after consultation with the Superintendent or designee. Uniforms should be tasteful and appropriate for the activity. Some approved uniforms may be appropriate for performances or competitions, but not for school attire. Uniforms worn on campus during the school day must meet the dress code guidelines.

~~GRADUATION ATTIRE~~

~~Each year students eligible to graduate will be given expectations for appropriate dress for the graduation ceremony.~~

Revised 6/10/96

Revised 12/13/99

Revised 1/14/02

Revised 12/8/03

Revised 2/12/07

Revised 12/10/18

Revised 12/9/19

Revised 12/12/22

Proposed Revision 11/10/25

This policy applies to the suspension or other disciplinary removal of a student with a disability from a current educational program. Disciplinary removal refers to reassignment of a student with a disability to an interim alternative education setting not specified in the student's IEP or ~~AP~~ **a Section 504 Accommodation Plan**. A student with a disability is defined as any student who has been determined disabled under IDEA or Section 504, Rehabilitation Act and has a current Individual Education Plan (IEP) or ~~Individual~~ **Section 504** Accommodation Plan (~~IAP~~).

These procedural safeguards also apply to a student if the district 'has knowledge' that the student may have a disability. For these protections to apply, the district must have knowledge of the suspected disability before the behavior that precipitates the disciplinary action occurs. The district is determined to have knowledge if:

- A parent has expressed concern in writing to an administrative personnel or the student's teacher that the student is in need of special education and/or related services;
- A parent has requested an evaluation for their child;
- The student's teacher has expressed specific concerns about a pattern of behavior directly to the Director of Special Education or school administrator.

The district is not deemed to have knowledge if:

- A parent has not allowed an evaluation of the student;
- A parent has refused to give consent to provide services to the student;
- A student has been evaluated and determined ineligible for Part B services.

A. Disciplinary Removal for Less Than Ten Days:

School personnel may unilaterally remove a student with a disability from the current educational placement for not more than ten school days within a school year without providing educational services for any conduct that would warrant disciplinary removal of a student without disabilities. The principal may remove a student for up to ten consecutive school days per offense, as long as the additional removals do not constitute a change in placement. The district will follow its policy and procedures for the suspension/ disciplinary removal of students without disabilities.

Change in placement occurs if a series of removals constitute a pattern. A pattern is determined by the length of each removal, the total amount of time the student is removed, the proximity of the removals to one another, and the nature of the offense.

B. Disciplinary Removal for More Than Ten School Days:

Prior to any change in placement resulting in a school removal of more than ten consecutive days per offense or ten cumulative days that constitute a change in placement, the student's IEP team **or their Section 504 team**, including the parents, must meet to determine if the misbehavior is a manifestation of the disability. ~~The following procedural safeguards shall be implemented not later than the tenth day after taking disciplinary action involving suspension or placement in an interim alternative education setting:~~

- ~~1. The principal will notify the student's parent/guardian in writing of the proposed disciplinary action and all procedural safeguards accorded under the law;~~
- ~~2. An IEP Review and Manifestation Determination meeting, to include the student's parents/guardians, shall be scheduled within ten school days after the date on which the decision to take disciplinary action was made;~~
- ~~3. The IEP team must either:~~
 - ~~a. Develop a plan to conduct a functional behavior assessment and develop a behavior intervention plan or;~~
 - ~~b. Review and modify an existing behavior intervention plan to address the misbehavior.~~

For removals of more than ten school days cumulative in a school year that do not constitute a change in placement, the principal must consult with the student's special education teacher to determine what services are required to provide free appropriate public education (FAPE) during the school removal. For removals of more than ten school days cumulative in a school year that do constitute a change in placement, the student's IEP team must determine what services are required to provide FAPE.

The alternative educational setting shall be determined by the IEP team and must be selected to:

1. Enable the student to continue to participate in the general curriculum, although in another setting; and
2. Enable the student to progress toward meeting the goals set out in the IEP.

School personnel may order a change in placement of a student with a disability to an appropriate interim alternative educational setting for 45 school days, even if a student's conduct is determined to be a manifestation of the student's disability, if:

1. The student carries a weapon to school or to a school function under the jurisdiction of the district (a device, instrument, materials or substance - animate or inanimate - that is used for or is readily capable of causing death or serious bodily injury, except that such term does not include a pocket knife with a blade of less than 2 1/2 inches in length;
2. The student knowingly possesses or uses illegal drugs or sells or solicits the sale of a controlled substance while at school or at a school function under the jurisdiction of the district (controlled substance as defined in the Controlled Substances Act and that the level of intent is "knowing").
3. The student has inflicted serious bodily injury upon another person while at school, on school premises, or at a school function under the jurisdiction of a school district. "Serious bodily injury" is defined to mean a bodily injury that involves a substantial risk of death, extreme physical pain, protracted and obvious disfigurement, or protracted loss or impairment of the function of a bodily member, organ, or faculty.

C. Manifestation Determination:

If school personnel wish to apply disciplinary procedures which are applicable to all students, the IEP team of a student with a disability must first determine whether the misconduct was a manifestation of the disability. In making a Manifestation Determination decision, an IEP team must review information in the student's file, relevant information supplied by the parents, observations of the student and the student's IEP and placement. The team should analyze the student's behavior as demonstrated across all settings and all time when determining whether the conduct in question is a direct result of the disability. The team must determine:

- Whether the conduct in question was caused by, or had a direct and substantial relationship to, the student's disability; or
 - Was the behavior the direct result of the district's failure to implement the IEP.
1. If the team determines a direct and substantial relationship between a student's behavior and the disability and/or the school's failure to provide or implement an IEP or placement, it must conclude that the behavior was a manifestation of the student's disability. The IEP team must meet the following requirements:
 - a. conduct a functional behavior assessment and implement a behavior intervention plan for the student, unless the district conducted one prior to the manifestation determination;
 - b. if the IEP team had previously developed a behavior intervention plan, it must review and modify the plan as necessary to address the behavior; and
 - c. return the student to the previous educational placement, unless the parent and the district agree to a change of placement or the 45-day rule exception applies (i.e., the three automatic 45-day removal violations).

Parents shall receive prior written notice of proposed disciplinary action and a copy of all procedural safeguards accorded under the law. If the school initiates disciplinary procedures, the team shall ensure that the special education and disciplinary records of the student are transmitted for consideration by the person making the final determination regarding the disciplinary action.

2. If the team finds that the behavior is not a manifestation of the student's disability, the school may discipline the student using the relevant disciplinary procedures applicable to all students in the same manner and for the same duration, but must ensure that FAPE services are provided.

D. Procedural Safeguards and Stay-put Rules:

Parents may challenge a Manifestation Determination or any decision regarding placement with a right to have an expedited due process hearing or mediation. Expedited hearing or mediation shall occur within twenty days of the hearing request, and the hearing officer must make a determination within ten school days after the hearing.

If parents request a hearing or mediation regarding disciplinary action or to challenge the interim alternative education setting (IAES) of the Manifestation Determination, the student shall remain in the interim alternative education setting pending the decision of the hearing officer or until the expiration of the time period set of the disciplinary action, whichever occurs first, unless the parent and district agree otherwise.

The district may request a hearing to change a student's placement if the district believes that maintaining the student's current placement is substantially likely to result in injury to the student or others. The hearing officer may order a change in placement to an interim alternative educational setting for a period of up to 45 days, if the hearing officer concurs with the district's assessment of the student.

E. Free Appropriate Public Education (FAPE):

FAPE means that the student must have the opportunity to make appropriate progress in the same curriculum as that offered to nondisabled students and make appropriate advancement toward the goals identified in the student's IEP. The student must receive FAPE during any periods of removal over ten school days in a school year, regardless of the relationship of the misbehavior to the disability. The district will provide appropriate educational and related services for students identified as disabled under Section 504 of the Rehabilitation Act only if it has been determined that the misconduct was related to the disability. Otherwise, educational services during removals shall be governed by district and state policy and procedures for suspension of nondisabled students.

F. Suspension From Transportation:

Suspension from transportation for more than ten school days within a school year is considered a change of placement if the bus suspension prevents the student from attending school, only if transportation is identified as a related service on the IEP. Such a transportation suspension will trigger an IEP Review and a Manifestation Determination meeting to consider whether the misconduct is related to the disability and to review or design a Behavior Intervention Plan to address the misconduct. The IEP team may consider a more restricted means of transportation by utilizing special transportation or the need to reimburse the student's parent for the reasonable cost of transporting the student to and from school at the district's rate for the duration of the suspension.

G. Referral to Law Enforcement/Judicial Authorities:

Nothing in IDEA prohibits a school from reporting a crime committed by a student with a disability to appropriate authorities or prevents state law enforcement and judicial authorities from exercising their responsibilities under federal or state law. The school district reporting the crime committed by a student with a disability shall ensure that copies of the special education and disciplinary records of the student are transmitted for consideration by the appropriate authorities subject to FERPA guidelines.

Adopted 11/11/96

Revised 12/8/97

Revised 12/13/99

Revised 1/14/02

Revised 1/16/06

Revised 12/10/07

Revised 12/10/18

Revised 12/13/21

Revised 12/12/22

Proposed Revision 11/10/25

All parties are scheduled and sponsored by the administration, teachers or parent group.

Pre-kindergarten through fifth grade may have two parties each year: Winter and Valentine's Day. Pre-kindergarten and kindergarten have the option of two additional parties, those being Fall Fun and Spring Fun.

~~Birthday parties, celebrations, treats, or goodie bags are not allowed to be brought to school to celebrate a child's birthday.~~ **Individual student birthday celebrations are not permitted during the instructional day. This includes the distribution or display of birthday treats, goodie bags, decorations, or other celebratory items brought from home. Families are encouraged to celebrate birthdays outside of school hours.**

School parties grades 6-12 must be held after school hours and approved in advance by the building principal.

Revised 6/10/96

Revised 12/14/98

Revised 12/13/99

Revised 12/8/03

Revised 1/18/10

Revised 12/9/24

Proposed Revision 11/10/25

A request for a transfer into Union Public Schools initiated by or on behalf of a nonresident student will be approved or refused in accordance with this policy. Intradistrict transfers (transfers from one school in the district to another school in the district) will also be governed by this policy.

Transfer Application

For nonresident students, an application for transfer shall be completed by the parent of a student on an application form specified by the State Board of Education. The term “parent” means the parent of a student or person having custody of the student as provided for in OKLA. STAT. tit. 70, § 1-113(A)(1).

In addition to completing the application form as specified by the State Board of Education, applicants must submit all required documents. The district will not approve an application for a transfer that is submitted without the completed forms and other required documents. The district shall approve or deny the application and shall notify the parents of the students, in writing, of the decision. Siblings must apply individually. Approved applications will be placed on a waiting list in the order they are approved. The transfer will occur when transfer capacity is available and parents agree to the placement.

For intradistrict transfers, an intradistrict transfer application must be completed.

Relocation of Family

A student whose family moves out of the school district during the school year may continue attendance as a transfer student if the student meets the behavior and attendance of transfer students as stated in this policy, but will be responsible for their own transportation; no district transportation will be provided.

Time of Receipt of Applications Determines Order of Review

Transfer requests will be dated and time-stamped as received, and the district shall consider requests on a first-come, first-served basis. Any currently enrolled district student for whom a transfer has been approved in the past and any sibling of such student will be given priority for transfer, and the first-come, first-served list will be compiled only after such current students and their siblings have been placed on the list. Transfers that have previously been approved by the school district will remain in effect for future school years unless the district provides notification to the parent or legal guardian that the transfer is not going to be continued for an upcoming school year due to disciplinary action or attendance issues. The district will not require parents to resubmit a new application each school year and will advance the previous application of an enrolled student.

Nondiscrimination

The district shall not accept or deny a transfer application based upon the student’s ethnicity, national origin, race, color, religion, gender, gender expression or identity, sex, sexual orientation, income level, pregnancy, genetic information, disabling condition, proficiency in the English language, measure of achievement, aptitude, or athletic ability. Failure to meet the criteria in this policy for approval will not be deemed to be rejection for a discriminatory reason.

Approval of Transfers

Once a completed application for a transfer has been submitted to the District, it will be forwarded to the superintendent or the superintendent’s designee for review and shall be considered in accordance with the criteria set forth below. The board of education delegates to the superintendent or the superintendent’s designee authority to approve or deny a transfer application pursuant to the criteria listed in this policy.

Criteria for Approval or Denial of Open Transfers

The fact that the district has adopted an open transfer policy does not mean that every transfer application will be accepted.

A transfer application will NOT be approved if this district does not:

- A. Provide the courses/educational program(s) in which this district deems the student is required to enroll in order to comply with state and federal laws and regulations;
- B. Have adequate facilities to provide the courses/educational program(s) in which this district deems the student is required to enroll in order to comply with state and federal laws and regulations;
- C. Have adequate space for the student in the courses/educational program(s) in which the applicant desires to enroll or in which the district deems the student is required to enroll in order to comply with state and federal laws and regulations. The administration may reserve space for resident students or new resident students reasonably anticipated to move into the district during the school year. Thus, the district may deny a transfer if

approval would result in exceeding enrollment capacity for transfer students.

A transfer will NOT be approved if the student:

- A. Has a disciplinary record which provides a reasonable basis to determine the applicant would present a discipline problem if enrolled. Such a reasonable basis will exist if school discipline or court records of the student, from any public or private school within or without the State of Oklahoma or any court within or without the State of Oklahoma, show the student at any time:
 - 1. Has violated school regulations;
 - 2. Has been adjudicated as a delinquent for an offense that is not a violent offense under relevant Oklahoma law;
 - 3. Has been adjudicated as a delinquent for an offense that is a violent offense under relevant Oklahoma law;
 - 4. Has been convicted as an adult for an offense defined in relevant Oklahoma law as an exception to a nonviolent offense;
 - 5. Has been convicted as an adult for an offense defined in relevant Oklahoma law as a violent offense;
 - 6. Has committed on school property, in school transportation, or at a school event a violent act or an act showing deliberate or reckless disregard for the health or safety of faculty or others;
 - 7. Has possessed on school property, in school transportation, or at a school event an alcoholic beverage, or missing or stolen property found to have been taken from a student, school employee, or the school during school activities; or,
 - 8. Has possessed on school property, while in school transportation, or at a school event a dangerous weapon or a controlled dangerous substance as defined by relevant Oklahoma law.
 - 9. Has a history of absences. "History of absences" means ten or more absences in one semester that are not excused for the reasons provided in 70 O.S. § 10-105 or due to illness.

A transfer will NOT be approved if the applicant:

- A. Fails to complete the Application Form or provide the district with sufficient educational records so that the criteria above can be applied within the time deadlines set by law for the approval or rejection of a transfer. All such records must be supplied to the district in time for district personnel to make a reasonable review of such records in applying the approval/denial criteria set by this policy. This is particularly important for students with disabilities, because all documentation of the resident district will need to be reviewed to make a preliminary determination as to whether the district has the appropriate programs, staff, and services to provide the applicant with the education and services set forth in the student's Individualized Education Plan (IEP) or Section 504 Accommodation Plan, and, if a preliminary approval determination is made, to prepare for and conduct a joint IEP or Section 504 conference with the resident district prior to any final approval or rejection of the transfer application. All applicants must consent in writing to the release of educational records from previous schools attended, and applicants for students with disabilities must consent in writing to forward to this district whatever confidential records this district deems is necessary to review in applying the approval/denial criteria of this policy. The Superintendent or designee has authority to request additional information needed to review an application request. Reference: OKLA. STAT. tit. 70, § 1-101.3, OKLA. ADMIN. Code §. 210-10-1-19.
- B. Fails to timely submit a completed application; or,
- C. Provides incorrect or incomplete information on the application request.

Union Public Schools will not accept tuition fees for the purpose of a transfer other than those required by law, special tuition-based programs, and cooperative programs for exceptional children.

Priority for transfers first will be given to applications for the enrollment of nonresident students who are children of full-time district employees or Union Schools Education Foundation employees. Students who reside in the subdivision Cedar Ridge East, also known as The Trails at Cedar Ridge, or Berwick and whose home resides on land claimed by Union Public Schools and another district may be granted a transfer into Union Public Schools.

Resident students who move outside of the district will be given priority for transfers. They will need to apply for a transfer and meet the criteria for approval.

A child who is in the custody of the Department of Human Services in foster care who is living in the home of a student who transfers to the district may also attend school in the district.

A child who is identified as homeless according to federal or state law shall be granted transfers in accordance with the applicable federal or state law.

Students with Disabilities **Special Considerations as to Transferring Student on an IEP**

If a student with a disability applies for a transfer, the student must supply all documentation of the resident district relating to the student's previous and current IEPs and Section 504 Accommodation Plans so that this district may:

- A. Determine whether the district currently has appropriate programs, staff, services and placement needed to fulfill the current or anticipated IEP or Section 504 Accommodation Plan of the student; and,
- B. If a preliminary determination is made that the district has the appropriate programs, staff, services, and placement needed to fulfill the current IEP or Section 504 Accommodation Plans of the student if the transfer application is approved, conduct the statutorily required joint IEP or Section 504 conference with the district of residence before a final determination of approval or denial is made.

Prior to approving an application for a transfer student who is a child with a disability, the District will establish the availability of the appropriate program, staff, and services for the transferring student, and conduct a joint conference with the IEP team at the transferring student's current school. The purpose of conducting these activities is to determine whether—at the time the transferring student's application is received—the District can provide the transferring student with a free appropriate public education in the least restrictive environment as required by the IDEA.

Notwithstanding the provisions of this policy, students with disabilities may be educated in this district pursuant to special education cooperative agreements between this district and other school districts. Such transfers will not be deemed to be parent- or student-initiated transfer applications governed by this policy.

Students from a District in which the Student's Grade is not Offered

The transfer of a student whose resident district does not offer the grade the student is entitled to pursue will be approved according to Oklahoma Law.

Students of Deployed Parents:

A student may apply for a transfer if he/she is the dependent child of a member of the active uniformed military services of the United States on full-time active duty status, and students who are the dependent children of a member of the military reserve on active duty orders shall be eligible for admission regardless of the capacity of the district if:

- A. At least one parent has a Department of Defense-issued identification card, and
- B. ~~At least one parent can provide evidence that he/she will be on active duty status or active duty orders, meaning the parent will be temporarily transferred in compliance with official orders to another location in support of combat, contingency operation, or a natural disaster requiring the use of orders for more than thirty (30) consecutive days.~~

The student will be residing with a relative of the student who lives in the receiving school district or who will be living in the receiving school district within six months of the filing of the application for transfer.

Athletic and Other Competition:

A transfer student may be eligible to participate in school-related interscholastic competition governed by the Oklahoma Secondary School Activities Association ("Association") if the conditions of the student transfer allow. Whether a student granted a transfer will be eligible to participate in school-related interscholastic competition shall be determined by the Association.

Approval of a Transfer Requires Agreement with Rules and Regulations:

Approval by this district of any transfer is contingent upon the applicant agreeing in writing to cancellation of this transfer by the district at the end of the school year if the student does not comply with the rules and regulations of this district for student behavior and attendance as stated by law. The Board of Education hereby delegates to the Superintendent or designee the authority to cancel any transfer previously granted upon a determination that cancellation is appropriate.

Students seeking a transfer from a non-accredited school or a home school will only be granted provisional approval pending review of test results and application of policy criteria to the placement deemed appropriate.

Students currently enrolled in a private school not accredited by a state agency or in a home school are not guaranteed enrollment in the grade/programs/courses in which the applicant desires to enroll. Students desiring to transfer from private schools not accredited by a state agency or from a home school will be required to take all placement tests required of resident students enrolling in the district after attendance in private schools not accredited by a state agency or home schools, and the administration will decide the appropriate placement primarily

upon placement test results as per district policy. Accordingly, students applying for a transfer from such schools will be granted a provisional transfer until: (a) test results are reviewed to determine the appropriate grade/courses/programs for the applicant and (b) the criteria of this policy is then applied to determine if the applicant is eligible for transfer approval.

Acceptance of Assignment Required; Subsequent Change Needs Administrative Approval

Because approval of transfers is based upon criteria of sufficient programs, staffing, and space needs for the particular applicant, a transfer student must accept the school site, courses, and programs to which the student is assigned by the administration. A transfer student will not be allowed, at the time of or after enrollment, to change the grade/courses/programs or school in which the student stated he or she desired to enroll on the transfer application without specific written permission from the Superintendent or designee. It will be the responsibility of the transfer student or parent to inform the school official from whom approval for a new assignment is requested that the student is a transfer student, and failure to do so will result in cancellation of the transfer unless excused by the Superintendent or designee.

Intradistrict Transfers

Intradistrict transfers are subject to the same capacity and programming limitations as other transfers.

Priority for intradistrict transfers first will be given to applications for students who are children of full-time district employees, Union Schools Education Foundation employees, students who are siblings of students who are attending the requested school, students who change residence within the district and wish to continue attending the same school, and students in the custody of the Department of Human Services and living in foster care with another student who has transferred.

Except for a child in the custody of the Department of Human Services in foster care, an intradistrict transfer student shall not transfer more than two times per school year, but the student may always reenroll at any time in the school of residence.

Intradistrict transfer approval is subject to the same rules as transfers from other districts and may be cancelled according to guidance in this policy.

By the first day of January, April, July, and October, the Board of Education shall establish the number of transfer students the district has the capacity to accept in each grade level for each school site within the district. Capacity levels shall be calculated by the Superintendent or designee and presented to the Board of Education for approval. The number of transfer students for each grade level at each site that the district has the capacity to accept will be posted in a prominent place on the school district's website. The district shall report to the State Department of Education the number of transfer students for each grade level for each school site which the district has the capacity to accept.

Upon notification of the transfer availability, the student has ten school days to begin to attend school at Union, or the opening will be offered to another student. If accepted, a student transfer is granted for the existing school year and the student may continue to attend in future years. At the end of the school year, the district may deny continued transfer of the student due to disciplinary reasons or for a history of absences.

If a transfer request is denied by the administration, the parent or legal guardian of the student may appeal the denial in writing within ten (10) days of notification of denial to the Board of Education. The Board of Education shall consider the written appeal at its next regularly scheduled board meeting for which notice is provided prior to the statutory deadline to post the agenda for the meeting.

During the appeal, the Board will review the action of the administration to make sure that the district policy was followed with regard to the denial of the transfer. The Board of Education will meet in an executive session to review the educational records of the student to make a determination on the transfer. This will be a paper appeal and will include the written documentation utilized by the school district as well as a written response from the parent or legal guardian which explains why the policy was not followed.

If the Board of Education votes to uphold the denial of the transfer, the parent or legal guardian may appeal the denial within ten (10) days of the notification of the appeal denial to the State Board of Education. The parent or legal guardian shall submit to the State Board of Education and to the superintendent of the district, a notice of appeal on the form prescribed by the State Board of Education.

Revised 6/10/96

Revised 2/3/97

Revised 12/14/98

Revised 12/13/99

Revised 1/8/01

Revised 12/8/03

Revised 12/13/04

Revised 2/12/07

Revised 12/10/07

Revised 1/18/10

Revised 3/21/11

Revised 4/11/11

Revised 12/12/11

Revised 7/8/13

Revised 12/8/14

Revised 12/14/15

Revised 11/14/16

Revised 11/8/21

Revised 12/13/21

Revised 3/7/22

Revised 12/11/23

Revised 2/13/24

Revised 7/10/24

Proposed Revision 11/10/25

EXTENDED SCHOOL YEAR/SPECIAL EDUCATION SERVICES 5504

Extended School Year (ESY) services may be defined as special education and/or related services which are provided to eligible children (aged 3-21) with disabilities beyond the traditional school year, to maintain academic or functional progress as necessary for a free appropriate public education (FAPE), in accordance with state standards and the Individuals with Disabilities Education Act (IDEA); ~~as amended by Public Law 105-17.~~

GUIDELINES

- A. ESY shall be developed and documented through the Individualized Education Plan (IEP) process.
- B. Students qualifying for ESY services shall be provided an appropriate program at no cost to the parents.
- C. Eligibility for ESY shall be made on an individual basis, not a student's categorical label.
- D. All special education students are eligible for consideration for ESY.

ELIGIBILITY FACTORS

- A. Degree of disability;
- B. Degree of regression suffered;
- C. Recovery time from this regression;
- D. Ability of parents to provide educational structure at home;
- E. Child's rate of progress;
- F. Child's behavioral problems;
- G. Child's physical problems;
- H. Availability of alternative resources;
- I. Ability of the child to interact with non-disabled children;
- J. Area(s) in curriculum which need continuous attention;
- K. Child's vocational needs;
- L. Whether the requested service is extraordinary for the child's disability, as opposed to an integral part of a program for those with the child's disability;
- M. Other relevant factors as determined by the IEP team.

PROCEDURES

- A. When the IEP team undertakes a determination of eligibility for ESY services, it shall collect and analyze all pertinent data regarding the student's physical and/or mental impairment, educational history and present educational functioning.
- B. Eligibility for ESY services shall be determined on an individual basis by the IEP team.
- C. When an IEP team determines that a special education student qualifies for ESY services in order to receive FAPE, the IEP team shall specify the instructional goals and services to be provided through ESY services. Parents shall receive prior written notice of ESY eligibility and services.
- D. Parents of a special education student who disagree with ESY eligibility and/or services may request mediation, as defined in Parents Rights in Special Education: Notice of Procedural Safeguards.

Revised 6/10/96

Revised 12/14/98

Revised 1/13/03

Revised 12/9/19

Proposed Revision 11/10/25

The Board of Education believes that positive parental involvement is essential to student achievement, and thus encourages such involvement in school educational planning and operations.

The district will put into operation programs, activities, and procedures for the involvement of parents in all of its schools with Title I, Part A programs [ESSA, Section 1112 (b)(7)].

- A. Involve parents and family members in jointly developing the local educational agency plan under section 1112, and the development of support and improvement plans under paragraphs (1) and (2) of section 1111(d);
- B. Provide the coordination, technical assistance, and other support necessary to assist and build the capacity of all participating schools within the local educational agency in planning and implementing effective parent and family involvement activities to improve student academic achievement and school performance, which may include meaningful consultation with employers, business leaders, and philanthropic organizations, or individuals with expertise in effectively engaging parents and family members in education;
- C. Coordinate and integrate parent and family engagement strategies under this part with parent and family engagement strategies, to the extent feasible and appropriate, with other relevant federal, state, and local laws and programs;
- D. Conduct, with the meaningful involvement of parents and family members, an annual evaluation of the content and effectiveness of the parent and family engagement policy in improving the academic quality of all schools served under this part, including identifying:
 - 1. Barriers to greater participation by parents in activities authorized by this section (with particular attention to parents who are economically disadvantaged, are disabled, have limited English proficiency, have limited literacy, or are of any racial or ethnic minority background);
 - 2. The needs of parents and family members to assist with the learning of their children, including engaging with school personnel and teachers; and
 - 3. Strategies to support successful school and family interactions;
- E. Use the findings of such evaluation in subparagraph (d) to design evidence-based strategies for more effective parental involvement, and to revise, if necessary, the parent and family engagement policies described in this section; technical assistance and training is provided to Title I school administrators by the Director of Federal Programs and the Executive Director of Elementary Education; and
- F. Involve parents in the activities of the schools served under this part, which may include establishing a parent advisory board comprised of a sufficient number and representative group of parents or family members served by the local educational agency to adequately represent the needs of the population served by such agency for the purposes of developing, revising, and reviewing the parent and family engagement policy [ESSA, 1116 (a) (2)].
- G. The district will utilize a coordination of local, state, and federal funds, i.e. Title II-Professional Development, Title III-English Language, Title IV-Safe Schools, Title IV-Indian Education, Title IX-McKinney-Vento, Special Education, and/or [Reading Sufficiency funds](#) [Strong Readers Act funds](#) to support the needs of our students and families.

Adopted 12/13/04

Revised 11/8/10

Revised 12/12/11

Revised 11/14/16

Revised 12/11/23

[Proposed Revision 11/10/25](#)

Materials selected for the Union Public School District will implement, enrich, and support the educational program of the school. This policy will govern the selection criteria and procedures for textbooks and resource materials.

RESPONSIBILITY FOR SELECTION

The Board of Education is legally responsible for the selection of materials. The authority to select is delegated to the professional personnel in the district.

A. Textbooks:

1. The Superintendent shall appoint an official local textbook committee consisting of not fewer than three **or more than nine** members. Each committee shall have at least one lay member, with the remainder of the members being teachers employed in the district, a majority of whom shall be classroom teachers. The Superintendent or designee, who shall be a principal or curriculum specialist, shall serve as chairman of such local textbook committee.
2. Those texts used uniformly throughout the district are referred to as system-adopted texts and are selected for the subject areas by consensus of the teachers of those subjects. The majority are selected from the list approved by the State Board of Education.

B. Resource materials:

1. Materials for the library resource centers are selected by the library media specialists with the cooperation of faculty, administration, parents, and students.
2. Such selections are subject to approval by the building principal and the appropriate administrative officials prior to order and placement in the library media centers.
3. Other resources will be selected by the instructional staff in accordance with curriculum objectives.

CRITERIA FOR SELECTION

A. Principles of selection are:

1. To provide materials which are of interest and have learning value.
2. To provide materials which realistically represent our pluralistic society and reflect the contributions made to our American heritage by these groups.
3. To provide instructional resource materials for the interest, information, and enlightenment of all students the school serves. Various points of view on current and historical issues should be included in district collections without regard to the origin, background, or views of those contributing to their creation.
4. Personal opinion and bias will not enter into the selection process.

B. Factors considered in selection are:

1. Appropriateness for the maturity level of the student.
2. Accordance with system curriculum goals.
3. Appearance of the title in standard review tools and the state textbook list.
4. Overall purpose of the materials.
5. Reputation of the author or publisher.
6. Accuracy of material.
7. Readability and reader appeal.
8. Quality of writing and illustrations.
9. Fairness of ethnic and gender role representation.
10. Format and price.

C. Procedures in specific areas:

1. Gifts: Gift materials may be accepted with the understanding that these materials must meet the same selection criteria as materials purchased with district funds and that the school will use the gift materials in accordance with the decisions of the appropriate personnel. Gift materials, once accepted, become the property of Union Public Schools.
2. Periodicals: Periodicals are purchased because of their overall reputation and are not rejected because of an occasional article which may be offensive. Subscriptions are reviewed annually and are subject to the selection process each year.
3. Non-print: All non-print materials will be subject to the same criteria as print material prior to purchase or use.

RECONSIDERATION PROCEDURES

- A. Students or parents have the right to object to the use of materials which seem incompatible with their values and beliefs. The person requesting the review may register the objection in writing on a Request for Reconsideration form. This form may be obtained from the Chief Communications Officer.
- B. No administrator, library media specialist, or teacher may withdraw an item without referring it to the Review Committee which determines whether the material should be withdrawn from any or all schools.
- C. The reconsideration procedures shall be as follows:
 1. The Request for Reconsideration form will be submitted to the principal, who will review the request and schedule a conference to discuss the matter with the student or parent. The principal may choose to invite a teacher or the library media specialist to contribute to this discussion.
 2. If the complaint is not resolved during the conference, the matter will be referred to a district-level Review Committee, which shall be appointed by the Superintendent or designee. The Superintendent shall also appoint a chairperson who will be responsible for all procedures. The committee shall be composed of the following:
 - a. Two parents or patrons of the district.
 - b. Two appropriate-level library media specialists.
 - c. Two appropriate-level teachers.
 - d. An administrator from the Teaching and Learning Department.
 - e. Two appropriate-level students (if secondary: 6-12 grades).
 - f. Complainant (who shall be non-voting).The committee shall be persons not involved in the earlier conference.
 3. The Review Committee will take the following steps as preparation for the review meeting.
 - a. Read, view, or listen to the material in its entirety.
 - b. Check general acceptance of the material by reading reviews and consulting recommended lists.
 - c. Determine the extent to which the material supports the curriculum, obtaining documentation from the teacher or library media specialist who selected the materials in question.
 - d. Complete the appropriate Checklist for School Media Advisory Committee's Reconsideration of Instructional Material, judging the material for its strengths and value as a whole and not in part.
 4. During the meeting, the complainant will have the opportunity to present views or may present views in writing.
 - a. The committee will discuss concerns as a group and vote by secret ballot. The decision will be reached by simple majority.
 - b. The complainant will receive notification of the committee's decision in writing.
 5. The decision of the committee will be given to the appropriate director who will see that the implementation of the decision takes place. Documentation associated with this meeting will be on file at the Education Service Center.
 6. A written appeal of the decision of the committee may be made within ten working days to the Board of Education through the Superintendent. The final decision rests with the Board of Education.
 7. Material which has undergone a challenge may not be rechallenged for the same objection until one calendar year after the recommendation of the Review Committee has been made.

Reference: OKLA. STAT. tit. 70 O.S. § 16-111

Revised 6/10/96
Revised 12/8/97
Revised 12/13/99
Revised 1/8/01
Revised 1/16/06
Revised 12/10/07
Revised 1/18/10
Revised 12/8/14

Revised 12/14/15
Revised 12/11/17
Proposed Revision 11/10/25

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