

KEYSTONE OAKS SCHOOL DISTRICT
1000 Kelton Avenue
Pittsburgh, PA 15216

BOARD OF SCHOOL DIRECTORS

BUSINESS/LEGISLATIVE MEETING

THURSDAY, NOVEMBER 21, 2013
7:00 PM

**KEYSTONE OAKS SCHOOL DISTRICT
SCHOOL DIRECTORS' CALENDAR OF COMING EVENTS**

November 21, 2013 – Business/Legislative Meeting

7:00 PM Meeting

- Call to Order – President
- Pledge of Allegiance
- Public Comment (Voting Items)
- Approval of Reports
- Public Comment (Any Topic)
- Adjournment

December 5, 2013 – Reorganization Meeting

5:30 PM Meeting

- Call to Order
- Pledge of Allegiance
- Election of Officers
- Reorganization Business
- Adjournment

BOARD PRESIDENT'S REPORT

November 21, 2013

Mrs. Marian Randazzo

BOARD ACTION REQUESTED

I. BOARD MINUTES

It is recommended that the Board approve the Work Session Minutes of October 10, 2013, and the Business/Legislative Minutes of October 17, 2013, as enclosed.

FOR INFORMATION ONLY

- | | |
|---|---------------------------|
| I. Parkway West Career and Technology Center Report | <i>Mr. Alward</i> |
| II. SHASDA Report | <i>Mr. Alward</i> |
| III. Golden Wings Foundation, Inc. Report | <i>Mrs. Randazzo</i> |
| IV. PSBA/Legislative Report | <i>Ms. Lindsey</i> |
| V. Castle Shannon Borough Council Minutes | <i>(Available Online)</i> |
| VI. Dormont Borough Council Minutes | <i>(Available Online)</i> |
| VII. Green Tree Borough Council Minutes | <i>(Available Online)</i> |

SUPERINTENDENT'S REPORT

November 21, 2013

Dr. William P. Stropkaj

BOARD ACTION REQUESTED

I. SECOND READING OF REVISED POLICY NO. 008: ORGANIZATION CHARTS

In accordance with Board Policy No. 011, the Administration recommends the SECOND READING of revised Policy No. 008: *Organization Charts*.

II. SECOND READING OF REVISED POLICY NO. 201: ADMISSION OF STUDENTS

In accordance with Board Policy No. 011, the Administration recommends the SECOND READING of revised Policy No. 201: *Admission of Students*.

III. SECOND READING OF REVISED POLICY NO. 233: SUSPENSION AND EXPULSION

In accordance with Board Policy No. 011, the Administration recommends the SECOND READING of revised Policy No. 233: *Suspension and Expulsion*.

IV. SECOND READING OF REVISED POLICY NO. 808: FOOD SERVICES

In accordance with Board Policy No. 011, the Administration recommends the SECOND READING of revised Policy No. 808: *Food Services*

V. SECOND READING OF REVISED POLICY NO. 826: RECORDS MANAGEMENT PLAN

In accordance with Board Policy No. 011, the Administration recommends the SECOND READING of revised Policy No. 826: *Records Management Plan*.

VI. SECOND READING OF REVISED POLICY NO. 835: FAMILY AND MEDICAL LEAVE

In accordance with Board Policy No. 011, the Administration recommends the SECOND READING of revised Policy No. 835: *Family and Medical Leave*.

FOR INFORMATION ONLY

I. EXECUTIVE SESSION REPORT

KEYSTONE OAKS SCHOOL DISTRICT

Policy Guide



Policy No. 008

Section LOCAL BOARD PROCEDURES

Title ORGANIZATION CHARTS

Adopted AUGUST 21, 1989

Revised NOVEMBER 17, 2011
NOVEMBER 16, 2009
FEBRUARY 16, 1998

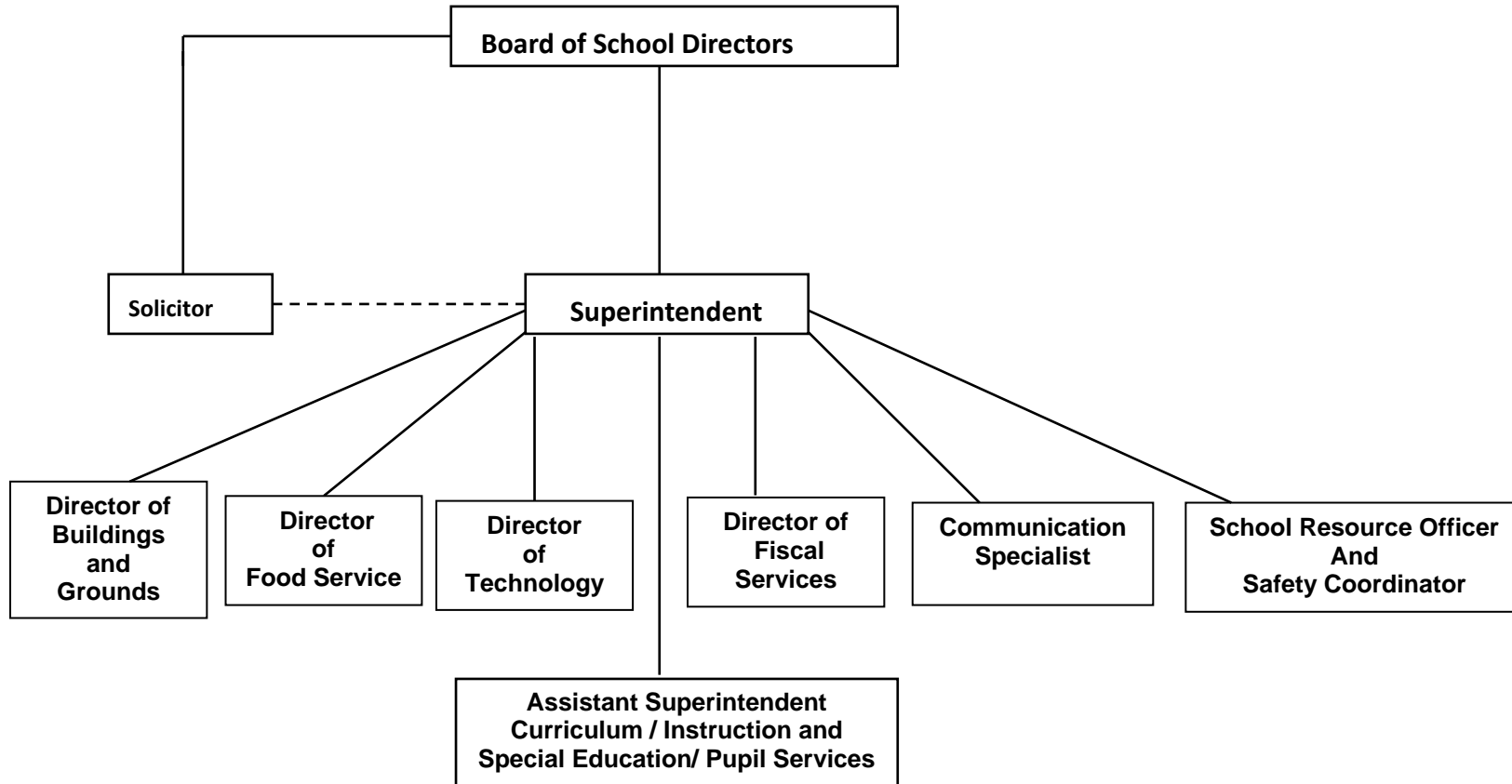
POLICY NO. 008
ORGANIZATION CHARTS

The management/personnel of the District is defined within the organization charts. The authority of positions and direct responsibilities and accountability to and from positions are represented in a hierarchical format by unbroken vertical lines. Broken horizontal lines represent lateral, nonauthoritative interactive responsibilities of position.



KEYSTONE OAKS SCHOOL DISTRICT

No. 008
LOCAL BOARD PROCEDURES
ORGANIZATION CHART
Adopted: August 21, 1989
Revised: November 17, 2011
November 16, 2009;
August 1998



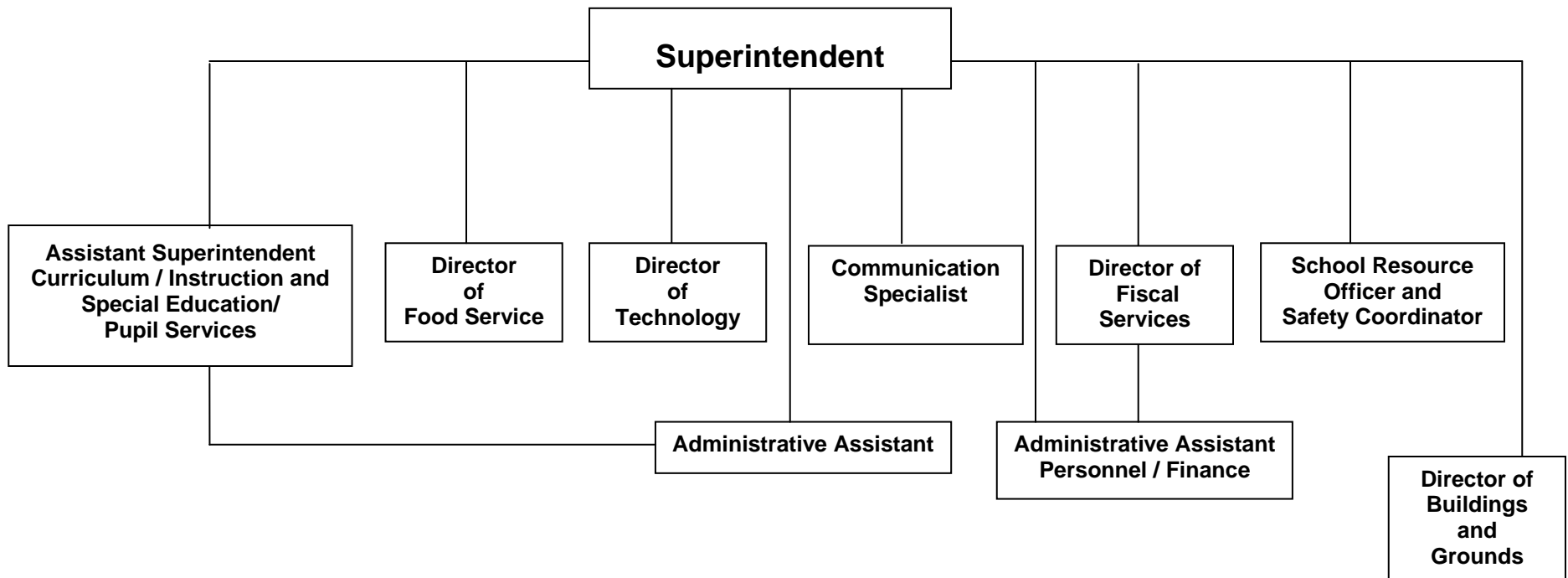


KEYSTONE OAKS SCHOOL DISTRICT

No. 008 LOCAL BOARD PROCEDURES ORGANIZATION CHART

Adopted: August 21, 1989

Revised: November 17, 2011
November 16, 2009;
March 19, 2001



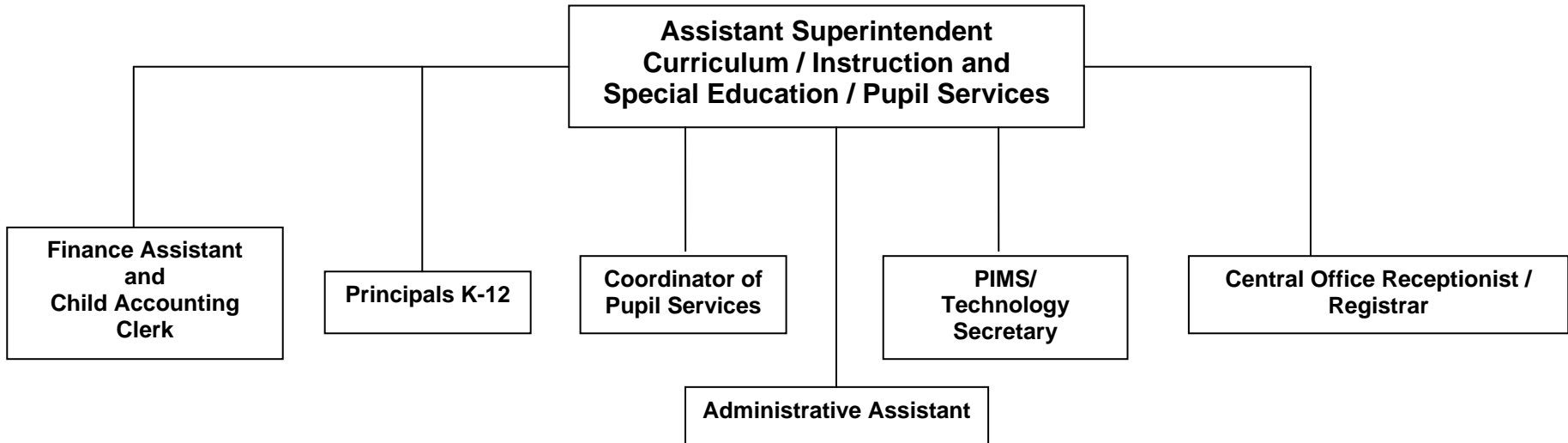


KEYSTONE OAKS SCHOOL DISTRICT

No. 008 LOCAL BOARD PROCEDURES ORGANIZATION CHART

Adopted: August 21, 1989

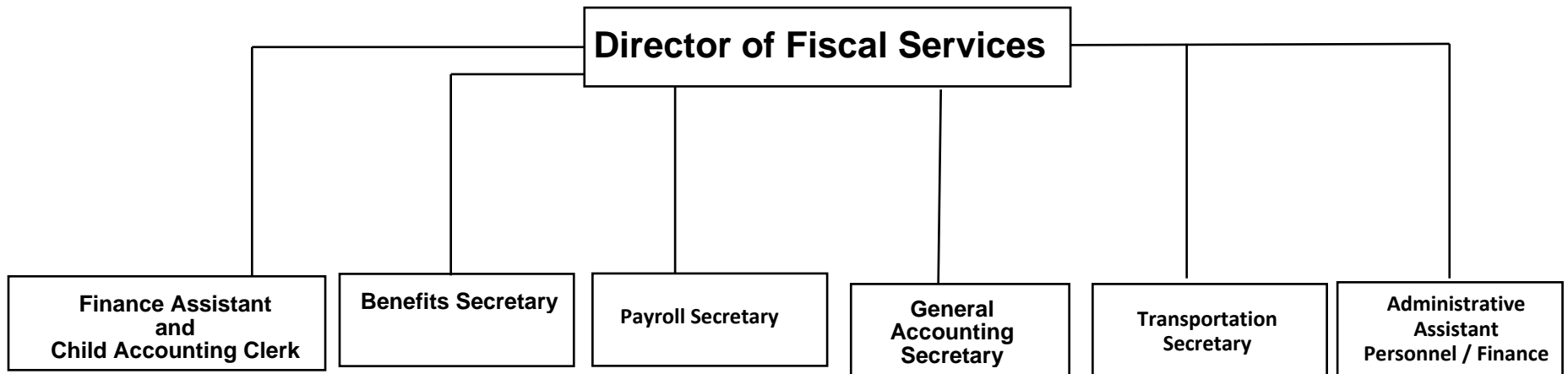
Revised: November 17, 2011
November 16, 2009;
March 19, 2001





KEYSTONE OAKS SCHOOL DISTRICT

No. 008
LOCAL BOARD PROCEDURES
ORGANIZATION CHART
Adopted: August 21, 1989
Revised: November 17, 2011
November 16, 2009
August 1999



Policy Guide



Policy No. 201

Section PUPILS

Title ADMISSION OF ~~BEGINNERS~~ STUDENTS

Adopted AUGUST 21, 1989

Revised MAY 21, 2001

<p>1. Purpose</p> <p>2. Authority</p>	<p style="text-align: center;">POLICY NO. 201 ADMISSION OF BEGINNERS STUDENTS</p> <p>The Board shall establish age requirements for the admission of beginners beginning students which are consistent with statute and sound educational practice and which insure the equitable treatment of all eligible children. law and regulations.</p> <p>A. <u>Beginners</u></p> <p>Beginners are children entering the lowest grade of the primary school above the kindergarten level. They shall be admitted to school only during the first two weeks of the annual school term, except that a child who is eight years of age may begin school at any time during the school year.</p> <p>Pupils who have not attended kindergarten will be enrolled in the first grade during the first two (2) weeks of school if they attain the age of six (6) years before the first day of September.</p>	<p>SC 1301</p> <p>SC 1304</p> <p>Title 22</p> <p>Sec. 11.15 SC 1304</p>
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**POLICY NO. 201
ADMISSION OF BEGINNERS
STUDENTS**

A beginner is eligible for admission to first grade if he/she is at least six (6) years of age on or before September 1.

The Board is not required to admit as a beginner any child whose age is less than the District's admission age for beginners.

B. Kindergarten

~~Pupils will be registered in kindergarten during specified times in February and during the first two (2) weeks of school if they will attain the age of five (5) before the first day of September.~~

A child is eligible for admission to kindergarten if he/she is five (5) years of age on or before September 1.

Pupils moving into the District who have already attended kindergarten or grade one, but do not meet age requirements of the District will be permitted to continue in the proper grade.

C. Early Admission

Administrators and counselors shall explain to parents the problems likely to arise when a child enters school before being ready. If the parents wish to pursue the matter, the following procedures shall be followed:

- a. The parents shall be referred to the Coordinator of Pupil Personnel ~~Services~~. K-5.**

Title 22
Sec. 11.15
SC 1304

3. Guidelines

**POLICY NO. 201
ADMISSION OF ~~BEGINNERS~~
STUDENTS**

- b. **The Coordinator will provide the parents with a minimum list of three qualified psychologists who can evaluate the child. This list may include the District psychologist (who will be acting outside of his/her role as a district employee), university psychology department graduate programs, or independent practitioners. The fee shall be set by the psychologist and paid by the parents.**

- c. **The psychologist shall contact the Coordinator of Pupil Personnel Services ~~K-5~~ for information as to the tests required by the School District. The district maintains the right to retest the child.**

- d. Criteria of evaluation will include intellect, maturation, skill development and socialization.

- e. The psychologist will submit a recommendation and all test data to the Coordinator of Pupil Personnel Services ~~K-5~~ and the Assistant Superintendent for review and approval. The decision of the Assistant Superintendent/ Superintendent is final. The names of students who qualify for early admission shall be submitted to the Superintendent. Parents of students who do not qualify for early admission shall be notified in writing by the ~~school psychologist.~~ **Superintendent.**

Title 22
Sec. 11.1

**POLICY NO. 201
ADMISSION OF BEGINNERS
STUDENTS**

- f. No child under the age of **four years, nine months** will be granted early admission to kindergarten.
- g. No child under the age of **five years, nine months** will be granted early admission to first grade.
- h. The Superintendent will notify the parents in writing of their child's early admission. A copy of this letter will be provided to the Board.

D. Transfer Students

Any student who transfers into the Keystone Oaks School District's kindergarten or first grade programs who ~~have~~ **has** not met the age requirement (see above) shall be evaluated for readiness and developmental skills through the **Office of the** Coordinator of Pupil Personnel Services. ~~K-5~~. Based upon the results of the evaluation, a parent meeting shall be convened with recommendations for appropriate grade placement. If parent disagrees the attached form must be completed for admission to occur.

4. Delegation of Responsibility

~~The Superintendent shall require that each child who registers for entrance to school exhibit a birth certificate or similar documentation as proof of age and birth date.~~

The Superintendent or designee shall require that the parent/guardian of each student who

**POLICY NO. 201
ADMISSION OF BEGINNERS
STUDENTS**

registers for entrance to school shall submit proof of age, residency, required immunizations, and Parent Registration Statement, as required by law and regulations, as then in effect.

**TRANSFER STUDENT READINESS
AND DEVELOPMENTAL EVALUATION**

Student Name _____

Current School _____

Current Grade _____

Results of Readiness/Developmental Screening and Recommendations

Signatures and Positions of Building Team Members

_____	_____
_____	_____
_____	_____
_____	_____

_____ I agree with the recommendations as presented by the Building Team.

_____ I disagree with the recommendations as presented by the Building Team.

Signature of Parent

Date

Student grade placement contrary to the team recommendation, at the parent's request, may necessitate retention at the close of this school year.

**POLICY NO. 233
SUSPENSION AND EXPULSION**

- c. preserve the degree of order necessary to the educational program in which they are engaged; and
- d. obey constituted authority and respond to those who hold that authority.

SC 1317

3. Definitions

Temporary Suspension

Temporary suspension shall mean exclusion from class for an offense for a period of up to three (3) school days, by the principal, without a hearing, in accordance with policies of the Board.

The principal or **administrative designee** shall provide an opportunity for the student to explain the circumstances surround the event for which the student is being suspended, to demonstrate that there is a case of mistaken identity or to show that there is some compelling reason why the student should not be suspended.

Administrators shall notify parents **promptly of their student's suspension**. Where it is impossible to contact parents during the school day, suspended students will not be sent home until normal dismissal time **unless the student's presence poses a threat to the health, safety and welfare of self, students and school personnel**.

Full Suspension

Full suspension shall mean exclusion for a period of up to ten (10) school days with the approval of the Superintendent, after an informal hearing is offered to the student and the student's parents, by

**POLICY NO. 233
SUSPENSION AND EXPULSION**

the principal, in accordance with policies established by the Board.

Expulsion

Expulsion is the prohibition of a student from attending school for a period exceeding ten (10) days.

If, after an informal hearing, it is determined that the offense committed by the student is of such magnitude that expulsion is recommended, the Superintendent shall initiate expulsion proceedings, including a formal hearing.

The student under seventeen (17) years of age who is expelled has forfeited the right to an education in the schools of this District, but has not been excused from compliance with the compulsory attendance statutes.

Parents or guardians who are unable to provide an education for their child shall submit a written statement within thirty (30) days that they are unable to do so. The District shall then make provisions for the student's education. If thirty (30) days pass without satisfactory evidence that the required education is being provided to the student, the District shall recontact the parent and make provisions for the student's education.

If the approved educational program is not complied with, the School District may take action to ensure that the student will receive a proper education.

Title 22
Sec. 12.6
(e) (2)

Title 22
Sec. 12.6
(e) (2)

Title 22
Sec. 12.6
(e) (3)
Title 22

**POLICY NO. 233
SUSPENSION AND EXPULSION**

Expulsion Hearing

Education is a fundamental right, and students shall be afforded all appropriate elements of due process if they are to be excluded from school. In a case involving a possible expulsion, the student is entitled to a formal hearing, which is a fundamental element of due process.

A formal hearing shall be conducted by a Board-selected hearing officer or a Board member.

A formal hearing shall be held before the Board or a duly authorized committee with no fewer than three (3) members of the Board. The hearing committee's decision is advisory to the Board. A majority vote of the entire Board is required to expel a student.

At the formal hearing, the following due process requirements shall be observed:

- a. notification of the charges, in writing, sent to the parents or guardian and the student by certified mail;
- b. sufficient notice of the time and place
- c. the right to an impartial tribunal;
- d. the right to be represented by counsel;
- e. the right to be presented with the names of witnesses against the student, copies of the statements and affidavits of those witnesses;

Sec. 12.1 (b)

42 PA. C.S.

**POLICY NO. 233
SUSPENSION AND EXPULSION**

- f. the right to demand that any such witnesses appear in person and answer questions or be cross-examined; and
- g. the student's right to testify and produce witnesses on one's own behalf.

A record shall be kept of the hearing, either by a stenographer or by tape recorder. The student is entitled, at the student's expense, to a copy of the transcript.

The proceeding shall be held with all reasonable speed.

If requested by the student or the student's parents, the hearing shall be held in private.

Where the student is dissatisfied with the results of the hearing, recourse can be made to the appropriate state court. If it is alleged that a constitutional issue is involved, the student may file a claim for relief in the appropriate federal district court.

A formal hearing before the Board shall be preceded by an informal hearing convened by the school principal. An informal hearing is also required in cases of full suspension.

At the informal hearing, the following due process requirements shall be observed:

- a. written notification of the reasons for the suspension, shall be given to the parents or guardian and/or to the student;

SC 6301-6308

**POLICY NO. 233
SUSPENSION AND EXPULSION**

- b. sufficient notice of the time and place of the informal hearing;
- c. the right to cross-examine any witnesses; and
- d. the student's right to speak and produce witnesses on his own behalf.

The Superintendent shall take all appropriate steps to comply with federal and state laws and regulations regarding the suspension or expulsion of exceptional students.

4. Guidelines

Students shall be permitted to make up exams and work missed while being disciplined by temporary or full suspension, within guidelines established by the Board.

The teacher shall determine how missed work will be made up within a reasonable period of time.

While on suspension/expulsion, students shall not be permitted on school property during or after the school day.

**POLICY NO. 233
SUSPENSION AND EXPULSION**

3. Guidelines

Exclusion from School – Suspension

**SC 1318
Title 22
Sec. 12. 6**

The principal or person in charge of the school may suspend any student for disobedience or misconduct for a period of one (1) to ten (10) consecutive school days and shall immediately notify the parent/guardian and the Superintendent in writing when the student is suspended.

**Title 22
Sec. 12.6**

No student may be suspended without notice of the reasons for which s/he is suspended and an opportunity to be heard on his/her own behalf before the school official who holds the authority to reinstate the student. Prior notice is not required where it is clear that the health, safety or welfare of the school population is threatened. Suspensions may not be made to run consecutively beyond the ten-school day period.

**Title 22
Sec. 12.6, 12.8**

When a suspension exceeds three (3) school days, the student and parent/guardian shall be given the opportunity for an informal hearing with the designated school official. Such hearing shall take place as soon as possible after the suspension, and the District shall offer to hold it within the first five (5) days of the suspension.

Informal hearings under this provision shall be conducted by the building principal.

Purpose of Informal Hearing

**Title 22
Sec. 12.8**

The purpose of the informal hearing is to permit the student to explain the circumstances

**POLICY NO. 233
SUSPENSION AND EXPULSION**

surrounding the event leading to the suspension, to how why the student should not be suspended, and to discuss ways to avoid future offenses.

Due Process Requirements for Informal Hearing

**Title 22
Sec. 12.8**

- 1. The student and parent/guardian shall be given written notice of the reasons for the suspension.**
- 2. The student and parent/guardian shall receive sufficient notice of the time and place of the informal hearing.**
- 3. The student may question any witnesses present at the informal hearing.**
- 4. The student may speak and produce witnesses who may speak at the informal hearing.**
- 5. The School District shall offer to hold the informal hearing within five (5) days of the suspension.**

Expulsion

**SC 1318
Title 22
Sec. 12.6, 12.8**

Expulsion is exclusion from school by the Board for a period exceeding ten (10) consecutive school days. The Board may permanently expel from the District rolls any student whose misconduct or disobedience warrants this sanction. No student shall be expelled without an opportunity for a formal hearing before the Board, a duly authorized

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SUSPENSION AND EXPULSION**

**SC 1318
Title 22
Sec. 12.6, 12.8
2 Pa. C.S.A.
Sec. 101 et seq**

committee of the Board, or a qualified hearing examiner appointed by the Board, and upon action taken by the Board after the hearing.

However, a voluntary expulsion may be entered into between the District and the student's parents whereby the parties agree to not go through a formal Board expulsion hearing and agree to the terms in a voluntary expulsion agreement. The voluntary expulsion agreement would need to be ratified by the Board as presented by the Superintendent.

Expulsion Hearings

A formal hearing shall be required in all expulsion actions.

**Title 22
Sec. 12.8**

The formal hearing shall observe the due process requirements of:

- 1. Notification of the charges in writing by certified mail to the student's parent/guardian.**
- 2. At least three (3) days' notice of the time and place of the hearing, which shall include a copy of this policy, hearing procedures, and notice of the right to representation by legal counsel. A student may request the rescheduling of the hearing when s/he demonstrates good cause for an extension.**
- 3. The hearing shall be private unless the student or parent/guardian requests a public hearing.**

**POLICY NO. 233
SUSPENSION AND EXPULSION**

- 4. Representation by counsel at the parents'/guardian's expense and parent/guardian may attend the hearing.**
- 5. Disclosure of the names of witnesses against the student and copies of their written statements or affidavits.**
- 6. The right to request that witnesses against the student appear in person and answer questions or be cross-examined.**
- 7. The right to testify and present witnesses on the student's behalf.**
- 8. A written or audio record shall be kept of the hearing and a copy made available to the student at the student's expense, or at no charge if the student is indigent.**
- 9. The hearing shall be held within fifteen (15) days of the notice of charges, unless a delay is mutually agreed to by both parties or is delayed by:**
 - a. The need for laboratory reports from law enforcement agencies.**
 - b. Evaluations or other court or administrative proceedings are pending due to a student's invoking his/her rights under the Individuals with Disabilities Education Act (IDEA).**
 - c. Delay is necessary due to the condition or best interests of the victim in cases of**

**POLICY NO. 233
SUSPENSION AND EXPULSION**

**juvenile or criminal court involving
sexual assault or serious bodily injury.**

10. Notice of a right to appeal the results of the hearing shall be provided to the student with the expulsion decision.

Adjudication

**2 Pa. C.S.A.
Sec. 101**

A written adjudication shall be issued after the Board has acted to expel a student. The adjudication may include additional conditions or sanctions.

Attendance/School Work During Suspension and Prior to Expulsion

**Title 22
Sec. 12.6**

Students serving an out-of-school suspension must make up missed exams and work, and shall be permitted to complete assignments pursuant to established guidelines.

Students who are facing an expulsion hearing must be placed in their normal classes if the formal hearing is not held within the ten school day suspension.

If it is not possible to hold the formal hearing within the first ten (10) school days, the School District may exclude such a student from class for up to five (5) additional – fifteen (15) total school days if, after an informal hearing, it is determined that the student's presence in his/her normal class would constitute a threat to the health, safety or welfare of others.

**POLICY NO. 233
SUSPENSION AND EXPULSION**

Any further exclusion prior to a formal hearing may be only by mutual agreement. Such students shall be given alternative education, which may include home study.

Attendance/School Work after Expulsion

Title 22

Students who are under seventeen (17) years of age are still subject to compulsory school attendance even though expelled and shall be provided an education.

The parent/guardian has the initial responsibility of providing the required education and shall, within thirty (30) days, submit written evidence to the school that the required education is being provided or that they are unable to do so. If the parent/guardian is unable to provide for the required education, the School District shall, within ten (10) days of receipt of the parent's/guardian's notification, make provision for the student's education.

The Board may provide an educational program to the student immediately upon expulsion and may waive the 30-day period, at its discretion.

Students with Disabilities

A student with a disability shall be provided educational services as required by state and federal laws and regulations and Board policies.

**POLICY NO. 233
SUSPENSION AND EXPULSION**

**4. Delegation of
Responsibility**

The Superintendent or designee shall develop procedures to implement this policy, which will include:

- 1. Publication of a Discipline Code, in accordance with Board policy on student discipline.**
- 2. Procedures that ensure due process when a student is being deprived of the right to attend school.**
- 3. Regulations regarding student records which require that records of disciplinary suspension be maintained in accordance with Board policy on student records.**
- 4. The name of a student who has been disciplined shall not become part of the agenda or minutes of a public meeting, nor part of any public record of the Board. Such students may be referred to by code letter or number.**
- 5. Any student who has been expelled may apply for readmission to school upon such conditions as may be imposed by the Board.**

Policy Guide



Policy No. 808

Section OPERATIONS

Title FOOD SERVICES

Adopted AUGUST 21, 1989

Revised MARCH 19, 2001

	<p style="text-align: center;">POLICY NO. 808 FOOD SERVICES</p> <p>1. Purpose The Food Service Programs of the District shall be directed at meeting the needs of the pupils in accordance with these guidelines, and that meet the nutritional standards required by state and federal school breakfast and lunch programs.</p> <p>2. Authority The Board shall provide food service for lunch in all buildings which may be purchased by students, teachers, cafeteria and other employees, but only for consumption on school premises.</p> <p>3. Delegation of Responsibility The operation and supervision of the food services program shall be the responsibility of the contractor under the Director of Fiscal Food Services.</p> <p>The cafeterias are to be operated on a nonprofit basis. A periodic review of the cafeteria accounts shall be made by the Superintendent Director of Fiscal Services monthly and the auditor. annually.</p> <p>To reinforce the District's nutrition education program, foods served in school cafeterias shall:</p> <p>1. Be carefully selected to contribute to</p>	<p>SC 504, 1337</p> <p>SC 504, 1337</p>
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**POLICY NO. 808
FOOD SERVICES**

students' nutritional well-being and health.

- 2. Meet the nutritional standards specified in laws and regulations and approved by the Board.**
- 3. Be prepared by methods that will retain nutritive quality, appeal to students, and foster lifelong healthy eating habits.**
- 4. The District shall use food commodities for school menus available under the Federal Food Commodity Program.**

4. Guidelines

Surplus accounts shall be used only for the improvement and maintenance of the food service program.

SC 504

All funds derived from the operation, maintenance or sponsorship of the food service facilities shall be deposited in the Food Service Account, a special bank account, in the same manner as other funds belonging to the School District. Such funds shall be expended in the manner approved and directed by the Board, but no amount shall be transferred from the Food Services Account to any other account or fund, except that District advances to the food services program may be returned to the District's general fund from any surplus resulting from its operation.

The District ~~shall~~ **will** participate in the Federal **National School Breakfast and Lunch Program and will abide by the regulations of that program.**

Free/Reduced Lunch and Free Milk Program

~~Free/reduced price lunches and free milk shall be~~

**POLICY NO. 808
FOOD SERVICES**

~~made available to students of the District in accordance with annual eligibility guidelines established by the federal government.~~

Free and reduced price meals will be provided to eligible children in compliance with the guidelines established by the federal government.

Prior to the opening of each school year, the ~~Home and School Visitor~~ **Director of Food Service** shall **will** prepare and forward to building principals letters to be disseminated to all parents/guardians of children enrolled in their buildings and to parents of students enrolling during the school year. The format of the written communication shall consist of making parents/guardians aware of the program; informing them of their rights to appeal an eligibility decision; and providing them with the eligibility criteria, application procedures, and an application. **Information will also be provided on the District's website.**

~~A public news release shall also be made annually by the District to make parents/guardians aware of the free/reduced lunch and free milk program.~~

Applications returned by the parent shall be forwarded to the ~~Home and School visitor~~ **Director of Food Service** who will determine eligibility and notify parents. The ~~Home and School Visitor~~ **Food Service Director** shall **will** notify principals or their designees of students eligible to receive free milk. ~~The Food Service Contractor shall be notified of students eligible for free/reduced lunches by the Home School Visitor.~~ **for free/reduced meals.**

**POLICY NO. 808
FOOD SERVICES**

The processing of applications and servicing of eligible students shall be done in a confidential manner to insure complete anonymity.

~~Free/reduced lunches will be provided only in those buildings in which a cafeteria is operated. Free milk will be provided where a hot lunch program is not in operation.~~

~~The District's free/reduced lunch and free milk policy shall be made accessible to the public and/or interested parties by the Superintendent upon receipt of a formal request.~~

The Superintendent and/or designee shall prepare guidelines for the implementation of a Food Service Program including:

- 1. The maintenance of facilities free from fire and health hazards.**
- 2. The purchase of perishable foodstuffs, seasonal commodities and other supplies.**
- 3. Accounting and depositing procedures for cafeteria funds.**
- 4. Control, safekeeping and storage of food and food equipment.**

The Superintendent or designee shall cooperate with the Department of Agriculture in conducting cafeteria health and safety inspections and ensuring employee participation in inspection services and training programs made available by the department.

SC 504

SC 504, 1337

Policy Guide



Policy No. 826

Section OPERATIONS

Title RECORDS MANAGEMENT PLAN

Adopted NOVEMBER 16, 2009

Revised _____

	<p style="text-align: center;">POLICY NO. 826 RECORDS MANAGEMENT PLAN</p> <p>1. Purpose The Board recognizes the importance of establishing and maintaining a Records Management Plan that defines District staff responsibilities and complies with federal and state laws and regulations. The Board also recognizes the importance of establishment of a "litigation hold" in appropriate circumstances, and the importance of compliance with a "litigation hold" when it is established.</p> <p>2. Authority The Board shall retain, as a permanent record of the District, Board minutes, annual auditor's reports and annual financial reports. All other financial records, including financial account books, orders, bills, contracts, invoices, receipts and purchase orders, shall be retained by the District for a period of not less than six (6) years.</p> <p>All other District records shall be retained in accordance with state and federal law and regulations and the District Records Management Plan approved by the Board.</p> <p>The District shall make a good faith effort to comply with all proper requests for record production.</p> <p style="text-align: center;">Page 1 of 29</p>	
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**POLICY NO. 826
RECORDS MANAGEMENT PLAN**

Selected destruction of records in anticipation of litigation is forbidden.

3. Definitions

Electronic Mail (E-mail) System

A system that enables users to compose, transmit, receive and manage text and/or graphic electronic messages and images across local area networks and through gateways connecting other networks. This information consists primarily of messages, but may include attachments such as calendars, directories, distribution lists, word processing documents, spreadsheets, and other electronic documents.

Litigation Hold

A communication ordering that all records and data relating to the subject of a dispute being addressed by current or impending litigation be preserved for possible production in the litigation.

Records

~~Any recorded information, regardless of form and including electronic records, that documents a transaction or activity that is created, received or retained in pursuance of law or in connection with the transaction of official business.~~

Information, regardless of physical form or characteristics, that document a transaction or activity of the District and that is created, received, or retained pursuant to law or in connection with a transaction, business or activity of the District. The term includes a document, paper, letter, map, book, tape, photograph, film or sound recording,

**POLICY NO. 826
RECORDS MANAGEMENT PLAN**

information stored or maintained electronically and a data-processed or image-processed document.

Records Management Plan

The system implemented by the District for the retention, retrieval, and disposition of all records generated by District operations.

Records Retention Schedule

A comprehensive listing stating retention periods and proper disposition of records.

Records Management Committee

~~The Superintendent, or his designee, shall be responsible for the development, management and implementation of the District's Records Management Plan. The Superintendent, or his designee, shall also be responsible for evaluating the effectiveness and implementation of the Records Management Plan and for recommending changes as needed.~~

A committee responsible for the development and recommendation of the District's Records Management Plan shall be established by the Board. The Records Management Committee shall give primary consideration to the most efficient and economical means of implementing the recommended Plan. Members of the Committee shall include the:

- 1. Open Records Officer;**
- 2. Superintendent;**

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4. Delegation of Responsibility

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- 3. Board Secretary;**
- 4. District Solicitor; and**
- 5. Information Technology Director or Designee.**

The Records Management Committee shall meet periodically to evaluate the effectiveness and implementation of the Records Management Plan and recommend changes as needed.

Records Coordinator

In order to maintain a Records Management Plan that complies with federal and state laws and regulations and Board policy, the Board designates the Superintendent as the District's Records Coordinator, with the understanding that the Superintendent shall have the authority to delegate various aspects of these responsibilities to persons employed by the School District in relevant positions, as determined by the circumstances.

The Records Coordinator shall be responsible to:

1. Ensure that training appropriate to the user's position and level of responsibility is provided. Such training may include:
 - (a) Operation, care and handling of the equipment and software;
 - (b) Requirements of the records retention schedule;
 - (c) Protocols for preserving and categorizing District records;

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- (d) Identification of what is and what is not a record;
- (e) Disposal of records.

- 2. Review the Records Management Plan periodically to ensure that record descriptions and retention periods are updated as necessary.
- 3. Identify, when the retention period expires, the specific records to be disposed of, ~~as needed.~~ **and ensure that all identified records are properly disposed of at least annually or at other regular intervals.**

5. Guidelines

Records Management Plan

The District's Records Management Plan shall be the principal means for the retention, retrieval, and disposition of manual and electronic records, including e-mails. The Plan shall not rely primarily on backup systems to manage the retention and disposition of records.

The Records Management Plan shall include:

- 1. Comprehensive listing of records and data of the District.
- 2. Criteria to distinguish ~~school district~~ **official records of the District from the supplemental personnel records of individual employees.** ~~from employee's records.~~
- 3. System(s) of records storage and retrieval to be used, including in what form the records will be stored, maintained, reproduced, and disposed.

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4. Preservation measures to protect the integrity of records and data.
5. Data map or flow chart detailing the sources, routes, and destinations of electronic records.
6. Procedures and employee designated for determining whether an item is a record.
7. Procedures for adding, revising or deleting records and data, and any other details necessary to implement the Records Management Plan.
8. Records retention schedule.
9. Provisions for the storage and retrieval of records in the event of an emergency or disaster.
10. Positions authorized to access District records.
11. Procedures to be implemented in the event of litigation hold that immediately suspends disposition of all records relevant to the current or potential claim. Such procedures shall specify:
 - (a) Who can initiate a litigation hold;
 - (b) How and to whom a litigation hold is communicated;
 - (c) Who will determine which records are subject to the litigation hold;
 - (d) Who will be responsible for collecting such records;

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- (e) In what format the records will be collected.

When possible, records and data shall be stored in their original form, including metadata, such as creation date, author, type of file, etc.

For any record not covered by the retention schedule, the ~~Superintendent~~ **Records Management Committee** shall determine how long the record shall be kept and recommend any necessary revisions to the retention schedule.

The District shall maintain and dispose of records in a manner that protects any sensitive, proprietary or confidential information or individual privacy rights, and helps conserve natural resources.

Manual Records

Manual records, which include all records not stored electronically, shall be retained and disposed of in accordance with the Records Management Plan.

Manual records shall be indexed in an organized and consistent manner, reflecting the way the records will be retained and referenced for later retrieval.

The District shall develop and maintain adequate and up-to-date documentation about each manual record system. Documentation may:

- (a) List system title and responsible employee(s) or office.
- (b) Define the contents of the system, including record formats.

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- (c) Identify vital records and information.
- (d) Determine restrictions on access and use.

Electronic Records

Electronic records shall be retained and disposed of in the same manner as records in other formats and in accordance with the Records Management Plan.

~~The District does not use archival file servers, except for the Student Information and Financial Systems. Thus, except for Student Information and Financial Systems records, electronic records are automatically purged from the District's file servers on a monthly basis; file server logs are kept only for the purpose of recovering from serious hardware failure and for network maintenance.~~

~~Consequently, it is the responsibility of the individual and/or the Department to maintain electronic records in a paper format, and to file them appropriately for the period of time required by the Records Management Plan.~~

~~It is also the responsibility of the individual and/or the Department to delete electronic files that are no longer needed to ensure that server storage space is not overlooked with unnecessary files.~~

Electronic records shall be indexed in an organized and consistent manner, reflecting the way records will be retained and referenced for later retrieval.

The District shall develop and maintain adequate and up-to-date documentation about each electronic record system. Documentation may:

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- 1. List system title and responsible employee(s) or office.**
- 2. Specify all technical characteristics necessary for reading or processing the records stored on the system.**
- 3. Identify all defined inputs and outputs of the system.**
- 4. Define the contents of the system, including records formats and database tables.**
- 5. Identify vital records and information.**
- 6. Determine restrictions on access and use.**
- 7. Describe update cycles or conditions.**

E-mail Records

E-mail messages, in and of themselves, do not constitute records. Retention and disposition of e-mail message depends on the function and content of the individual message. A staff member who has an email that is pertinent to a project or an issue, or which otherwise meets the definition of "record" set forth herein, needs to properly archive

the email (and all attachments thereto) electronically, or to paper file it within the proper file.

For each e-mail considered to be a record, the following information (at a minimum) shall be retained:

1. Message content;
2. Name of sender;

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3. Name of recipient; and
4. Date and time of transmission and/or receipt.

Records on an e-mail system, including messages and attachments, shall be retained and disposed of in accordance with the District's Records Management Plan. E-mail records may be maintained as an electronic record or be printed and maintained as a manual record.

E-mail messages and attachments **that do not meet the definition of records** shall be deleted ~~every~~ **thirty (30) days, as required by the Records Management Plan.**

E-Mail Archival

The District does utilize an archival e-mail server. E-mail is archived for six (6) months, after which it is automatically deleted.

Any staff member who has an e-mail that is pertinent to a project, issue, etc., needs to personally archive the e-mail. Users can also paper file any e-mail.

E-mail and computer logs are only kept for the purpose of recovering from severe hardware failure and for network maintenance. It is the responsibility of the individual and/or department to properly save and file e-mails after they are read.

Contractors

Records created or maintained by contractors employed by the Board shall be retained and disposed of in accordance with the Records Management Plan.

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References:

School Code – 24 P.S. Sec. 433, 518

Right-to-Know Law – 65 P.S. Sec. 67.101 et seq.

**Family Educational Rights and Privacy Act
20 U.S.C. Sec. 1232g**

**Federal Rules of Civil Procedure – 16, 26, 34,
37, 45**

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APPENDIX A – LITIGATION HOLD

When the District receives notice that the District is involved in litigation as a party to a lawsuit, the District is issued a subpoena by a party to a lawsuit in which it is not a party, an investigation concerning the District has commenced or may commence, or the District receives information that would lead a reasonable person to anticipate the possibility of litigation, the District will immediately take steps to ensure that any records and data that could be related to the ongoing litigation/investigation or potential litigation/investigation are preserved from deletion or destruction.

Actions to preserve records and data will include, but not be limited to, postponing or canceling any automatic deletion of electronically stored information until relevant information and documents can be identified and stored, notifying employees of a litigation hold to prevent the deletion and destruction of records and data that might be related to the litigation/investigation or potential litigation/investigation, and identifying records and data that are subject to preservation.

A litigation hold triggers the duty to preserve records and data that could otherwise be deleted or destroyed under the District's Records Management Plan.

The District Solicitor(s) will be responsible for issuing a litigation hold that specifically describes the types of records and data that

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APPENDIX A – LITIGATION HOLD

must be preserved and describes how those materials are to be maintained and stored. The litigation hold will be sent directly to the Records Coordinator, who will acknowledge receipt of the litigation hold. The litigation hold may be communicated initially by phone, but will be followed by a written notification (fax, email or letter).

The Records Coordinator, in consultation with the District Solicitor(s), will decide which records and data are subject to the litigation hold and in which form the records will be retained or produced. The Records Coordinator will be responsible for:

- 1. Coordinating the collection and preservation of records and data that are subject to the litigation hold.**
- 2. Monitoring and ensuring the District's compliance with the litigation hold.**
- 3. Checking periodically on the status of a litigation hold.**
- 4. Ensuring that all steps taken by the District to identify and preserve relevant records and data are documented.**

The Solicitor will inform the Records Coordinator of changes as they occur.

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**APPENDIX B
RECORDS RETENTION SCHEDULE**

How to Use the Records Retention Schedule

The Records Retention Schedule lists records that are created, received or retained as a result of District operations. The schedule includes a description of the records, format in which the records will be retained, classification of the records, retention period, and disposal code. The following information will assist in applying this schedule.

Record Formats

Media codes are used to identify the format(s) that the District may choose to maintain specified records and are assigned as follows:

- A. Paper**
- B. Microform**
- C. Electronic (machine readable)**
- D. Audiovisual (tapes, movies, film strips, etc.)**
- E. Cartographic (maps, drawings, blue prints, plans, etc.)**
- F. Photographic**

Retention Periods

Retention periods listed on the schedule are given in years, unless otherwise indicated. Upon expiration of the retention period, all identified records will be disposed of in accordance with Board policy and this schedule.

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**APPENDIX B
RECORDS RETENTION SCHEDULE**

Disposal Codes

Disposal codes are used to direct the final disposition of records. Records must be disposed of according to the assigned code listed on the schedule. Assigned disposal codes are as follows:

- 1. Routine Handling – No special precautions are necessary upon disposal. The records should be recycled or disposed of in accordance with standard District procedures.**
- 2. Special Handling – The destruction of records containing privileged, confidential, exempt or sensitive information that requires special handling by shredding, burning, erasing or any other method that reduces information to an illegible condition.**
- 3. Archival Retention – Records requiring permanent retention or records that have sufficient archival or historic value must be preserved in perpetuity.**
- 4. Delete – For use with electronic records. When electronic records have met their retention period, they will be deleted.**

Records Not On Schedule

For any record not covered by the retention schedule, the Records Management Committee will determine how long the record must be kept and recommend any necessary revisions to the retention schedule.

RECORDS RETENTION SCHEDULE – (Page 16 of 29)

Record Description	Record Format	Retention Period (in years)	Disposal Code
Administrative Records			
Feasibility Studies	A, C	3	1, 4
PSSA Results	A, C	Permanent	3
Public Record Requests	A, C	1 from date received ¹	1, 4
School District Report Cards	A, C	Permanent	3
Strategic Plan	A, C	One (1) copy permanent	3
Benefits / Insurance Records²			
Claims	A, C	6 after settlement	2, 4
COBRA Records	A, C	6 ³	
Enrollment Forms	A, C	Term of benefits plus 6	2, 4
Policies / Plans / Contracts	A, C	6 after expiration	1, 4
Child Labor Records			
Applications for Work Permits	A, C	2 after graduation ⁴	2, 4

RECORDS RETENTION SCHEDULE – (Page 17 of 29)

Record Description	Record Format	Retention Period (in years)	Disposal Code
Employment Report from Employer	A, C	2 ⁵	2, 4
Complaints / Challenges			
Investigation Records	A, C, D, E, F	6 after final resolution	2, 4
Made by District Employee(s)	A, C	6 after final resolution ⁶	2, 4
Regarding District Employee(s)	A, C	6 after employment ends	2, 4
Regarding Instructional Materials or District Programs	A, C	6 after final resolution	1, 4
District Organization Records			
District Boundaries / Attendance Areas	A, C, E	Permanent	3
Photographs / Movies of Historical Value	C, D, F	Permanent	3
Employment Contracts			
Administrative Compensation Plan	A, B, C	One (1) copy permanent	3
Collective Bargaining Agreements	A, B, C	One (1) copy permanent	3
Individual Employment Contracts/ Board Resolutions	A, C	4 after employment ends	1, 4

RECORDS RETENTION SCHEDULE – (Page 18 of 29)

Record Description	Record Format	Retention Period (in years)	Disposal Code
Facility Use Records			
Applications	A, C	6	1, 4
Fee Schedule(s)	A, C	Current	1, 4
Financial Records⁷			
Accounts Payable	A, C	6	1, 4
Accounts Receivable	A, C	6	1, 4
Adopted Annual Budget	A, B, C	10	1, 4
Annual Financial Reports	A, B, C	Permanent	3
Annual Audit Reports	A, B, C	Permanent	3
Bank Statements	A, C	6	1, 4
Check Registers	A, C	6	1, 4
Deposit Slips	A, C	6	1, 4
General Ledger	A, B, C	Permanent	3

RECORDS RETENTION SCHEDULE – (Page 19 of 29)

Record Description	Record Format	Retention Period (in years)	Disposal Code
Grant Records (Successful)	A, C	6 after close of grant	1, 4
Investment Records	A, B, C	6 after cancellation	1, 4
Purchase Orders / Invoices	A, C	6	1, 4
Tax Collection Records	A, C	6	1, 4
Free and Reduced Lunch Program Records⁸			
Accounts / Audits	A, C	3 – 5	1, 4
Application for Participation	A, C	3 – 5	2, 4
Program Requirements	A, C	3 – 5	1, 4
Grievances / Arbitrations			
Complaint	A, B, C	Permanent	3
District Response	A, B, C	Permanent	3
Final Ruling / Decision of Arbitrator	A, B, C	Permanent	3

RECORDS RETENTION SCHEDULE – (Page 20 of 29)

Record Description	Record Format	Retention Period (in years)	Disposal Code
Litigation Files			
Pleadings, Motions, Briefs, Other Filings	A, B, C	7 after final conclusion of litigation	1, 4
Decision / Ruling	A, B, C	7 after final conclusion of litigation	1, 4
Medical Records			
Medical Documentation (Employee Leave, Accommodations)	A, C	6 after employment ends	2, 4
Medical Records / Information (Employee)	A, C, D, E	6 after employment ends ⁹	2, 4
Medical Records / Information (Employee Exposure to Toxic/Harmful Substances)	A, C, D, F	30 after employment ends ¹⁰	2, 4
Medical Records / Information (Students)	A, C, D, F	2 after enrollment ends ¹¹	2, 4
Pre-Employment Medical Examination ¹²	A, C	6 after employments ends ¹³	2, 4
Payroll Records¹⁴			
Deduction Authorizations	A, C	6	2, 4
Direct Deposit Forms	A, C	6	2,4

RECORDS RETENTION SCHEDULE – (Page 21 of 29)

Record Description	Record Format	Retention Period (in years)	Disposal Code
Employee Earnings Statements (Pay Stubs)	A, C	6 ¹⁵	2, 4
Time Cards / Sheets	A, C	6 ¹⁶	1, 4
Wage and Tax Statements (W-2 Forms)	A, C	6 ¹⁷	2, 4
Withholding Allowance Certificates (W-4 Forms)	A, C	6 after superseded OR employment ends ¹⁸	2, 4
Personnel Records¹⁹			
Acknowledgement of Receipt (Handbooks / Policies)	A, C	6 after superseded OR employment ends	1, 4
Advertised Job Openings / Postings	A, C	4 after position filled ²⁰	1, 4
Attendance Records (Employees)	A, C	6 after employment ends	1, 4
Background Check Documentation ²¹	A, C	6 after employment ends	2, 4
Change(s) in Status (Promotion / Transfer / Furlough / Recall)	A, C	6 after employment ends ²²	2, 4
Continuing Education / Professional Development	A, C	6 after employment ends	2, 4
Credentials (Certificates / Licenses)	A, C	6 after employment ends	1, 4
Discipline Records (Employees)	A, C	6 after employment ends	2, 4

RECORDS RETENTION SCHEDULE – (Page 22 of 29)

Record Description	Record Format	Retention Period (in years)	Disposal Code
Employment Application / Resume (Hired)	A, C	6 after employment ends	2, 4
Employment Application / Resume (Not Hired)	A, C	4 after position filled ²³	2, 4
Employment Eligibility Verification (Form I-9 and Documentation)	A, C	6 after employment ends ²⁴	2, 4
Equal Employment Opportunity Reports and Demographics	A, C	3 ²⁵	1, 4
Evaluation (Employees)	A, C	6 after employment ends	2, 4
Job Description	A, C	6 after employment ends	1, 4
Leave Records (FMLA) ²⁶	A, C	6 after employment ends ²⁷	2, 4
Leave Records (Other)	A, C	6 after employment ends	2, 4
Offer of Employment (Accepted)	A, C	6 after employment ends	1, 4
Pre-Employment Reference Checks ²⁸	A, C	6 after employment ends	2, 4
Resignations	A, C	6 after employment ends	1, 4
Retirement Records	A, B, C	Permanent	2, 4
Training Certificates / Information	A, C	6 after employment ends	1, 4

RECORDS RETENTION SCHEDULE – (Page 23 of 29)

Record Description	Record Format	Retention Period (in years)	Disposal Code
User Agreement(s)	A, C	6 after employment ends	1, 4
Property Records			
Building Blueprints	C, E	Permanent	3
Construction Contracts	A, B, C	12 after completion ²⁹	1, 4
Deeds and Related Records	A, B, C	Permanent	3
Equipment Inventories	A, C	6	1, 4
Fixed Asset List	A, B, C	Permanent	3
Inventory Disposal Records	A, C	3 after disposition	1, 4
Leases (Real Estate)	A, B, C	Permanent	3
Leases (Equipment / Vehicles)	A, B, C	6 after expiration	1, 4
Pesticide Application Record	A, C	3 ³⁰	1, 4
Real Property Purchase or Sale	A, B, C	Permanent	3

RECORDS RETENTION SCHEDULE – (Page 24 of 29)

Record Description	Record Format	Retention Period (in years)	Disposal Code
Purchasing Records (Goods and Services)			
Advertisements	A, B, C	6 after completion	1, 4
Bid Documents (Accepted)	A, B, C	6 after completion ³¹	1, 4
Bid Documents (Declined)	A, C	3 after completion ³²	1, 4
Financial Information of Bidders	A, C	3 after completion	2, 4
Specifications	A, B, C	6 after completion	1, 4
Written or Telephone Price Quotations	A, C	3 after completion ³³	1, 4
Safety Records			
Accident Reports	A, C	6 ³⁴	2, 4
Emergency Preparedness Plan	A, C	2 after revised ³⁵	1, 4
Material Safety Data Sheets (MSDS)	A, C	30 ³⁶	1
Safe School Act Reports	A, B, C	Permanent ³⁷	3
Visitor Registration	A, C	5	1, 4

RECORDS RETENTION SCHEDULE – (Page 25 of 29)

Record Description	Record Format	Retention Period (in years)	Disposal Code
School Board Records			
Board Meeting Agendas	A, C	1	1, 4
Board Minutes (Approved)	A, B, C	Permanent ³⁸	3
Board Policies and Procedures (Current)	A, B, C	Permanent	3
Board Policies and Procedures (Old)	A, B, C	Permanent	3
Ethics Statement of Financial Interest	A, C	5 ³⁹	1, 4
Student Records	Refer to Student Records Plan⁴⁰		
Transportation Records (Drug/Alcohol Testing)⁴¹			
Negative or Below Limit Test Results	A, C	1	2, 4
Positive or Above Limit Test Results	A, C	5	2, 4
Records Related to Collection Process	A, C	2	2, 4
Records Related to Education and Training	A, C	2 after employment ends	2, 4
Refusal to Take Required Test	A, C	5	2, 4

RECORDS RETENTION SCHEDULE – (Page 26 of 29)

Record Description	Record Format	Retention Period (in years)	Disposal Code
Workers' Compensation Records	A, B, C	7 after claim closed ⁴²	2, 4

¹65 P.S. Sec. 67.502(b)(2)(iii) requires that an electronic or paper copy of the written request and all documents submitted with the request be maintained either 1) until the request has been fulfilled; 2) if the request is denied, for thirty (30) days; or 3) if an appeal is filed, until a final determination is made or the appeal is deemed denied. Keeping from 1 year of date request received would be safe for all periods in the Act, establish some precedent for the open records officer, and give evidence of repeated requests (burdensome). 67.506(a).

²29 CFR Sec. 1627.3(b)(2) requires employers to keep "benefit plans" for the term of the plan plus at least 1 year after termination.

³Retention period not specified in COBRA but recommended that records be retained in accordance with FRISA, See 29 U.S.C. Sec. 1027.

⁴PDE recommendation — FAQs for PA Child Labor Law.

⁵43 P.S. Sec. 58.1(d) requires school districts to keep the required employment report/information for 2 years.

⁶29 CFR Sec. 1602.14 and 1627.3(b)(3) require retention of relevant records until final disposition.

⁷SC 518 requires permanent retention of annual auditor's reports and annual financial reports. SC 518 also requires districts to maintain all other financial records for at least 6 years.

⁸7 CFR Sec. 210.9 requires free and reduced lunch accounts and records to be maintained for a minimum of 3 years. If a federal audit is being conducted, records must be kept until the audit is completed. SC 1337(e) requires free and reduced lunch accounts and records to be maintained not in excess of 5 years.

⁹29 CFR Sec. 1627.3 (b)(1)(v) requires the results of any physical examination to be kept for at least 1 year from the date of the personnel action which the records relate when the exam results are considered in connection with any personnel action. If an enforcement action is under way, the required records shall be maintained until final disposition.

¹⁰29 CFR Sec. 1910.1020(d)(1)(i) requires the retention of "employee medical records" for at least the duration of employment plus 30 years. 29 CFR Sec. 1910.1020(d)(1)(ii) requires the retention of "employee exposure records" for at least 30 years. Terms are defined in 29 CFR Sec. 1910.1020(0)(5), (6). See 29 CFR Sec. 1910.1020(b) for applicability.

¹¹SC 1409, 28 PA Code Sec. 23.55.

¹²42 U.S.C. Sec. 12112(d)(3)(13), 29 CFR Sec. 1630.14(e)(1) requires that this information be collected on separate forms, kept in separate files and be treated as confidential medical records.

¹³29 CFR Sec. 1627.3 (b)(1)(v) requires the results of any physical examination to be kept for at least 1 year from the date of the personnel action which the records relate when the exam results are considered in connection with any personnel action. If an enforcement action is under way, the required records shall be maintained until final disposition.

¹⁴29 CFR Sec. 516.5, 516.6, 1620.32 and 1627.3(a) require retention of specified payroll records/information for at least 1-3 years. SC 518 requires retention of financial records for at least 6 years.

¹⁵ 29 CFR Sec. 516.6(c)(1) requires retention of records of additions to or deductions from wages paid for at least 2 years.

¹⁶ 29 CFR Sec. 516.6(a)(1) requires retention of time cards/sheet for at least 2 years when used to determine pay period earnings or wages.

¹⁷ 26 CFR 31.6001.1(e)(2) requires the retention of tax records for at least 4 years after the due date of the tax for the return period that the records relate or the date the tax is paid, whichever is later. PHMC recommendation for local governments was 4 years.

¹⁸ 26 CFR 31.6001.1(e)(2) requires the retention of tax records for at least 4 years after the due date of the tax for the return period that the records relate or the date the tax is paid, whichever is later. PHMC recommendation for local governments was 4 years.

¹⁹ 29 CFR Sec. 1602.14 requires employers to keep any personnel or employment records for at least 1 year from the date of making the record or the personnel action involved, whichever is later. If a claim is filed or action is under way, the relevant records shall be maintained until final disposition.

²⁰ 29 CFR Sec. 1627.3 (b)(1)(vi) lists records to be kept for 1 year. if enforcement action is under way, the required records shall be maintained until final disposition.

²¹ 22 PA Code Sec. 8.2(d) states that criminal history information is confidential and not available to anyone not involved in hiring decision. 23 Pa C.S.A. Sec. 6344.2. 55 PA Code Sec. 3490.132 requires an administrator to keep the clearance statement in the employee's file

²² 29 CFR Sec. 1627.3 (b)(1)(i) lists records to be kept for 1 year. If an enforcement action is under way, the required records shall be maintained until final disposition. Statute of limitations under 42 U.S.C. 1981 is 4 years.

²³ 29 CFR Sec. 1627.3 (b)(1)(i) lists records to be kept for 1 year. If an enforcement action is under way, the required records shall be maintained until final disposition. Statute of limitations under 42 U.S.C. 1981 is 4 years.

²⁴ 8 U.S.C. Sec. 1324a(b)(3) and 8 CFR Sec. 274a.2(b)(2)(i)(A) requires retention for 3 years after the date of the hire or 1 year after the date the individual's employment is terminated, whichever is later.

²⁵ 29 CFR Sec. 1602.39, 1602.41 requires form EEO-5 and records necessary to complete EEO-5 to be maintained for 3 years. 1602.40 lists personnel records that must be kept for 2 years.

²⁶ 29 CFR Sec. 825.500(g) requires medical records and documents created for FMLA purposes be maintained as confidential medical records in separate files from the usual personnel files.

²⁷ 29 CFR Sec. 825.500(b) requires specified FMLA records to be kept for no less than 3 years.

²⁸ 43 P.S. Sec. 1321 defines "personnel file" to exclude "letters of reference".

²⁹ 42 Pa. C.S.A. Sec. 5536 states that civil actions regarding construction projects must be commenced within 12 years after completion of the construction.

³⁰ SC 772.2(b)(2) requires each school to maintain detailed records of all chemical pest control treatments for at least 3 years.

³¹ PHMC recommendation for municipal governments — administrative and legal — contract files.

³² PHMC recommendation for municipal governments — administrative and legal — contract files.

³³ SC 751 and 807.1 require the retention of written price quotations and written records of telephonic price quotations for 3 years.

³⁴ 29 CFR Sec. 1904.33(a) requires the retention of the OSHA incident report forms for 5 years following the end of the calendar year that the records cover.

³⁵ 35 Pa. C.S.A. Sec. 7701(g) requires plan to be reviewed annually and updated as necessary.

³⁶ 29 CFR Sec. 1910.1020(c)(5) defines "employee exposure records" to include material safety data sheets (MSDS) indicating that the material may pose a hazard to human health. See 29 CFR Sec. 1910.1020(d)(1)(ii) for exceptions and alternate records.

³⁷ SC 1317.2 (13EC) Sec. IV issued July 1 2002, SC 1307-A also requires school entities to maintain records of all applicable incidents but does not list retention period(s).

³⁸ SC 518 requires permanent retention of the "minute book" of each district.

³⁹ 65 Pa. C.S.A. Sec. 1107(9) requires the retention of financial interest statements for 5 years from date of receipt.

⁴⁰ 22 PA Code Sec. 12.32 requires each district to develop a plan for the collection, maintenance and dissemination of student records.

⁴¹ 49 CFR 382.401 lists applicable retention periods. 49 CFR 3 82.405 puts limits on release of records.

⁴² SCS recommendation.

KEYSTONE OAKS SCHOOL DISTRICT

Policy Guide



Policy No. ~~335~~ 835

Section ADMINISTRATIVE EMPLOYEES OPERATIONS

Title FAMILY AND MEDICAL LEAVE

Adopted AUGUST 21, 1989

Revised OCTOBER 18, 1999

	<p style="text-align: center;">POLICY NO. 335-835 FAMILY AND MEDICAL LEAVE</p> <p style="text-align: center;">This Policy supersedes Policies 335 and 435</p> <p>1. Purpose It is the policy of the Keystone Oaks School District to provide eligible employees with unpaid, job-protected leave for certain family and medical reasons in accordance with the requirements of the Family and Medical Leave Act of 1993.</p> <p>The purpose of this policy is to address specific leave of absence issues and to ensure the District's compliance with the Family and Medical Leave Act of 1993, hereinafter referred to as FMLA.</p> <p>2. Delegation of Responsibility The Superintendent or designee shall develop administrative guidelines regulating leaves and shall ensure the District's compliance with the FMLA. Although implementing the guidelines is the responsibility of the Superintendent, the guidelines must adhere to the basic principles of the FMLA.</p> <p>3. Guidelines Required notices shall be posted by the District.</p> <p style="text-align: center;">Page 1 of 22</p>	<p>29 USCA § 2601 et seq.</p>
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Guides advising employees of their rights and responsibilities shall be developed and posted. The guides shall be given to employees upon request, whenever an employee requests an FMLA leave, and whenever the District designates a leave as an FMLA leave.

All requests for leave, both FMLA leave and non-FMLA leave, shall be made in writing on a District form. The form shall request sufficient information to determine whether the leave qualifies as an FMLA leave.

If the employee requesting an FMLA leave qualifies for and is entitled to any paid leave under a collective bargaining agreement, District Policy or statutory mandate, the employee may utilize such leave during the FMLA leave at his/her discretion.

Medical certification forms shall be required whenever allowed or authorized by the FMLA.

Employees shall be required to provide a fitness-for-duty certificate from a qualified medical professional upon returning from an FMLA leave when the leave was taken because of the employee's own serious health condition, except where such a requirement would be in violation of a collective bargaining agreement or where the employee has taken a paid leave concurrent with the FMLA leave and District Policy and practice has not required a fitness-for-duty certificate to be provided.

Seniority shall accrue for all purposes during FMLA leaves and credit shall be given during FMLA leaves for accruals and other leaves,

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subject to any applicable collective bargaining agreement or statutory provisions to the contrary.

For purposes of determining whether an eligible employee under the FMLA has exhausted the twelve (12) weeks of leave in any twelve (12) month period, the District shall utilize a rolling twelve-month period measured backwards from the date leave is used, to avoid stacking of back-to-back leave entitlements.

For all other purposes, calculation of the twelve (12) month period of eligibility for FMLA leave shall be according to law, subject to any applicable collective bargaining agreement provisions.

An employee will be denied intermittent leave or leave on a reduced schedule to care for an immediate family member with a serious health condition, as defined by the FMLA, or if the employee has a serious health condition, when:

- 1. The employee fails to establish through medical certification that there is a medical need for such a leave, as distinguished from voluntary treatments and procedures.**
- 2. The employee fails to establish through medical certification that it is medically necessary for the leave to be taken intermittently or on a reduced leave schedule.**

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Eligibility for an FMLA leave shall be based entirely on the criteria established by the FMLA. This Policy shall not be construed to expand eligibility for an FMLA leave beyond what is required by law.

Instructional employees may be required to continue FMLA leave to the beginning of a grading period or term if conditions of leave are those specified in the FMLA.

1. Definitions

- a. "Child" - A biological, adopted or foster child, a stepchild, a legal ward, or a child of a person standing in loco parentis, who is under age 18 or age 18 or older but incapable of self-care because of mental or physical disability.
- b. "Family Member" - Spouse, child, or parent of an employee.
- c. "Health Care Provider" - Doctors of medicine or osteopathy authorized to practice medicine or surgery; podiatrists, dentists, clinical psychologists, optometrists and chiropractors (in certain situations) authorized to practice and performing within the scope of their practice under state law; nurse practitioners and nurse-midwives authorized to practice and performing within the scope of their practice under state law, or Christian Science practitioners listed with the First Church of Christian Science, in Boston, MA.

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- d. “Instructional Employee” - An employee whose principle performance responsibility is teaching students.
 - e. “Intermittent Leave” -Leave taken otherwise than a continuous block of consecutive work days, e.g., a leave schedule that reduces some of the scheduled work days or hours per work day of an employee.
 - f. “Parent” - A biological parent or person who stood in loco parentis.
 - g. “Serious Health Conditions” - An illness, injury, impairment or physical or mental condition that involves inpatient care in a medical care facility, subsequent treatment in connection with such care, or continuing treatment by a health care provider.
 - h. “Spouse” - Husband or wife.
 - i. “Year” - September 1 through August 31, beginning with September 1, 1998.
2. **Eligibility** - To be eligible for Family and Medical Leave (FML), an employee must have been employed by the School District for at least twelve (12) months prior to the leave commencement date and have provided at least 1,250 hours of service to the School District during the twelve-month period immediately preceding the leave commencement date.

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3. Leave

a. Eligible employees shall be entitled to a total of twelve work weeks, i.e., sixty (60) work days of unpaid leave during any year for one or more of the following reasons:

- (1) Birth, or the placement for adoption or foster care, of a child. The entitlement to leave for this reason shall expire at the end of the twelve-month period beginning on the date of such birth or placement.
- (2) Care of the employee's family member who has a serious health condition.
- (3) Care of the employee's own serious health condition which causes the employee to be unable to perform employment duties.

b. Where two spouses are employed by the Keystone Oaks School District, they will be jointly entitled to a combined total of twelve (12) weeks of FML for the birth or placement of a child for adoption or foster care, and for the care of a parent who has a serious health condition.

4. Continuation of Benefits

During the period of Family and Medical Leave, the School District, at its expense, shall continue to maintain the employee's coverage under the applicable group health care, dental, vision and life insurance benefit plans, at the same levels and under the same conditions at

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which coverage would have been provided if the employee had not taken the leave. In all other respects, such leave shall be without salary or compensation of any kind, except as set forth within paragraph 5(a) herein.

5. Limitation on Leave

a. Integration with other leaves

- (1) If at the time of commencement of FML, an employee has any accrued paid leave days provided by the Keystone Oaks School District or properly carried over from another employer (e.g., sick leave, personal leave, sabbatical leave, vacation leave), the employee shall use all or part of such paid leave as part of the Family and Medical Leave in the manner established by any applicable collective bargaining agreement or employment contract; such paid leave shall be integrated into the Family and Medical Leave, at the beginning of said leave. In the event the employee is not employed in a bargaining unit position or has not entered into an employment agreement with the School District, the employee may, at his/her option, use such paid leave as part of the Family and Medical Leave provided herein; such paid leave shall be integrated into the Family and Medical Leave, at the beginning of said leave.
- (2) Leave taken pursuant to a disability benefit plan or workers' compensation will be credited against an employee's Family and Medical Leave Act entitlement, if the leave is for a "serious health condition" under the Act

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and as defined herein. In such circumstances, the employee may, but will not be required to, also use his/her accrued paid leave.

b. Notice to School District

Where the leave is foreseeable, the employee must provide at least thirty (30) days' advance written notice to the District Superintendent and the Director of Fiscal of the date when the leave is to begin. Where the leave is not foreseeable, the employee shall provide such notice as is practicable under the circumstances. Regardless of the timing of the notice to the School District, said notice shall be on the Request for Leave Form attached hereto as Appendix A, shall indicate the reason for the leave, and where requested as a result of the employee's own serious health condition, shall be accompanied by a completed Certification of Health Care Provider, on the form attached hereto as Appendix B.

c. Notice to Employee

If an employee is on leave of absence, and the School District has information from the employee or the employee's health care provider, spouse, etc., which would qualify the absence as a Family and Medical Leave Act leave, the School District may so designate the leave, by notifying the employee of said designation in writing within two business days after the School District becomes aware that the leave is being taken for an FML qualifying

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reason. If the School District does not timely designate the leave as FML, the leave will be designated as FML prospectively, from the date of

d. Intermittent Leave

(1) Noninstructional Employees

(a) Intermittent leave shall not be permitted except where medically necessary; intermittent leave shall be permitted only in connection with a serious health condition of the employee or his/her family member. Subject to the approval of the employee or family member's health care provider, the employee shall make reasonable efforts to schedule leave time and/or medical treatments so as to minimize the disruption of the School District's operations.

(b) Where the need for an intermittent leave is foreseeable, the School District reserves the right to require the employee to transfer to an available alternative position which is equivalent in pay, for which the employee is qualified, and which better accommodates the intermittent leave request.

(2) Instructional Employees

(a) Intermittent leave shall not be permitted except where medically

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necessary; intermittent leave shall be permitted only in connection with a serious health condition of the employee or his/her family member.

Subject to the approval of the employee or family member's health care provider, the employee shall make reasonable efforts to schedule leave time and/or medical treatments so as to minimize the disruption of the School District's operations.

- (b) Where the need for FML is foreseeable based upon planned medical treatment required for a serious health condition of an employee or his/her family member and the employee would be on leave for greater than twenty percent (20%) of the total number of working days in the period during which the leave would extend, the School District reserves the right to require such employee to:
- i. to take leave for periods of a particular duration not to exceed the duration of the planned medical treatment; or
 - ii. to transfer temporarily to an available alternative position offered by the District for which the employee is

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qualified and which has equivalent pay and benefits and which better accommodates recurring periods of leave than the employee's regular position.

6. Return from Leave

a. Time of Return of Noninstructional Employees

A noninstructional employee shall return to work at or before the expiration of the twelve-week period of Family and Medical Leave Act leave, PROVIDED HOWEVER, that a noninstructional employee who at the conclusion of the twelve-week period, has remaining unused, paid leave days, may continue to use such paid leave days in accordance with School District policy.

b. Time of Return of Instructional Employees

An instructional employee who is afforded Family and Medical Leave shall return to work at or before the expiration of the twelve-week period of Family and Medical Leave Act leave, PROVIDED HOWEVER, an instructional employee who at the conclusion of the twelve-week period, has remaining unused, paid leave may continue to use such paid leave days in

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accordance with School District policy. Nonetheless, the School District retains the right to adjust the date of the employee's return to work as follows:

(1) Leave Five or More Weeks Prior to End of Semester

If the employee begins FML five or more weeks prior to the end of the semester, the School District may require the employee to remain on leave until the end of such term if (1) leave is of at least three weeks in duration; and (2) the return to employment would occur during the last three weeks of the semester.

(2) Leave Less than Five Weeks Prior to End of Semester

If the employee begins FML for reasons other than his/her own serious health condition during the five week period prior to the end of the semester, the School District may require the employee to remain on leave until the end of such term if (1) the leave is longer than two weeks; and (2) the return to employment would occur during the last two weeks of the semester.

(3) Leave Less than Three Weeks Prior to End of Semester

If the employee begins FML for reasons other than his/her own

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serious health condition during the three weeks prior to the end of the academic term, and the leave period is more than five working days, the School District may require the employee to remain on leave until the end of such semester.

c. Position Upon Return

Upon return from leave, the Employee shall be assigned to the same or an equivalent position, in terms of pay and other terms and conditions of employment.

d. Failure to Return

If an employee fails to return to work after the leave period has expired, the employee shall be obligated to repay the School District the amount of any insurance premiums paid by the School District for continuation of the employee's health, dental, vision and life insurance benefits during the period of the said leave which was unpaid leave. The employee shall also be subject to termination of said benefits. An employee shall be excused from repayment only if the failure to return results from a continuation, recurrence or onset of a serious health condition of the employee or the employee's family member, or other circumstances beyond the employee's control.

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7. Medical Certification

- a. The School District will require an employee seeking FML as a result of his/her own serious health condition, or that of a family member, to provide a certification from the applicable health care provider, on the form attached hereto as Appendix B, as to:
- (1) Date that the condition commenced;
 - (2) Anticipated duration of the condition;
 - (3) The necessity for the employee's leave;
 - (4) As applicable, the employee's inability to perform his/her own job function.
- b. The School District reserves the right to obtain a second or third opinion, at its expense.
- c. With respect to an employee's own serious health condition, the School District shall require recertification of the employee's need for the leave every thirty (30) calendar days, or with respect to an intermittent leave, at appropriate times as determined by the condition/recovery period as originally identified by the health care provider. The School District shall maintain a record of this information on the form attached hereto as Appendix C.
- d. With respect to FML taken as a result of

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~~an employee's own serious health condition, prior to the employee's return to work, the School District will require the Employee to provide a certification from his/her health care provider indicating that the employee is able to return to work.~~

APPENDIX A

**KEYSTONE OAKS SCHOOL DISTRICT
FAMILY/MEDICAL LEAVE
REQUEST FOR LEAVE FORM**

Type or Print

TO BE COMPLETED BY EMPLOYEE	
1. Name of employee (First Name, Middle Initial, Last Name).	2. Employee's position
3. Reason for requested leave: a. <input type="checkbox"/> Birth of a son or daughter of the employee in order to care for such son or daughter. b. <input type="checkbox"/> Placement of a son or daughter with employee for adoption or foster care. c. <input type="checkbox"/> In order to care for a spouse, child or parent ("covered relation") with a serious health condition. d. <input type="checkbox"/> Because of my own serious health condition which makes me unable to perform the functions of my position. A certification of health care provider is/is not attached hereto. (Circle one)	
4. If "c," please check one: <input type="checkbox"/> Spouse <input type="checkbox"/> Child <input type="checkbox"/> Parent	5. If "c," state name and address of relation.
6. Date on which you wish leave to commence.	7. Date of anticipated return to work.
8. Are you requesting leave on an intermittent or reduced leave schedule? <input type="checkbox"/> Yes <input type="checkbox"/> No	9. If yes, please give schedule of when you anticipate you will be unavailable for work.

APPENDIX B

**Certification Of Health
Care Provider**
(Family and Medical Leave Act of 1993)

U.S. Department Of Labor
Employment Standards Administration
Wage and Hour Division

1. Employee's Name	2. Patient's Name (If different from employee)
3. The attached sheet describes what is meant by a "serious health condition" under the Family and Medical Leave Act. Does the patient's condition¹ qualify under any of the categories described? If so, please check the applicable category. (1) _____ (2) _____ (3) _____ (4) _____ (5) _____ (6) _____, or None of the above _____	
4. Describe the medical facts which support your certification, including a brief statement as to how the medical facts meet the criteria of one of these categories:	
5.a. State the approximate date the condition commenced, and the probable duration of the condition (and also the probable duration of the patient's present incapacity² if different):	
b. Will it be necessary for the employee to take work only intermittently or to work on a less than full schedule as a result of the condition (including for treatment described in item 6 below)? If yes, give the probable duration:	
c. If the condition is a chronic condition (condition #4) or pregnancy, state whether the patient is presently incapacitated² and the likely duration and frequency of episodes of incapacity²:	

¹ Here and elsewhere on this form, the information sought relates only to the condition for which the employee is taking FMLA leave.

² "Incapacity," for purposes of FMLA is defined to mean inability to work, attend school or perform other regular daily activities due to the serious health condition, treatment thereof, or recovery therefrom.

6.a If additional treatments will be required for the condition, provide an estimate of the probable number of such treatments:

If the patient will be absent from work or other daily activities because of treatment on an intermittent or part-time basis, also provide an estimate of the probable number of and interval between such treatments, actual or estimated dates of treatment if known, and period required for recovery if any:

b. If any of these treatments will be provided by another provider of health services (e.g., physical therapist), please state the nature of the treatments:

c. If a regimen of continuing treatment by the patient is required under your supervision, provide a general description of such regimen (e.g., prescription drugs, physical therapy requiring special equipment):

7.a. If medical leave is required for the employee's absence from work because of the employee's own condition (including absences due to pregnancy or a chronic condition), is the employee unable to perform work of any kind?

b. If able to perform some work, is the employee unable to perform any one or more of the essential functions of the employee's job (the employee or the employer should supply you with information about the essential job functions)? _____ If yes, please list the essential functions the employee is unable to perform:

c. If neither a. nor b. applies, is it necessary for the employee to be absent from work for treatment?

8.a. If leave is required to care for a family member of the employee with a serious health condition, does the patient require assistance for basic medical or personal needs or safety, or for transportation?

b. If no, would the employee's presence to provide psychological comfort be beneficial to the patient or assist in the patient's recovery?

c. If the patient will need care only intermittently or on a part-time basis, please indicate the probable duration of this need:

(Signature of Health Care Provider)

(Type of Practice)

(Address)

(Telephone Number)

To be completed by the employee needing family leave to care for a family member:

State the care you will provide and an estimate of the period during which care will be provided, including a schedule if leave is to be taken intermittently or if it will be necessary for you to work less than a full schedule:

(Employee Signature)

(Date)

A "Serious Health Condition" means an illness, injury impairment, or physical or mental condition that involves one of the following:

1. Hospital Care

Inpatient care (i.e., an overnight stay) in a hospital, hospice, or residential medical care facility, including any period of incapacity² or subsequent treatment in connection with or consequent to such inpatient care.

2. Absence Plus Treatment

(a) A period of incapacity² of more than three consecutive calendar days (including any subsequent treatment or period of incapacity² relating to the same condition), that also involves:

(1) Treatment³ two or more times by a health care provider, by a nurse or physician's assistant under direct supervision of a health care provider, or by a provider of health care services (e.g., physical therapist) under orders of, or on referral by, a health care provider; or

(2) Treatment by a health care provider on at least one occasion which results in a regimen of continuing treatment⁴ under the supervision of the health care provider.

3. Pregnancy

Any period of incapacity due to pregnancy, or for prenatal care.

4. Chronic Conditions Requiring Treatments

A chronic condition which:

(1) Requires periodic visits for treatment by a health care provider, or by a nurse or physician's assistant under direct supervision of a health care provider;

(2) Continues over an extended period of time (including recurring episodes of a single underlying condition); and

(3) May cause episodic rather than a continuing period of incapacity² (e.g., asthma, diabetes, epilepsy, etc.).

³ Treatment includes examinations to determine if a serious health condition exists and evaluations of the condition. Treatment does not include routine physical examinations, eye examinations or dental examinations.

⁴ A regimen of continuing treatment includes, for example, a course of prescription medication (e.g., an antibiotic) or therapy requiring special equipment to resolve or alleviate the health condition. A regimen of treatment does not include the taking of over-the-counter medications such as aspirin, antihistamines, or salves; or bed-rest, drinking fluids, exercise, and other similar activities that can be initiated without a visit to a health care provider.

5. Permanent/Long-term Conditions Requiring Supervision

A period of incapacity² which is permanent or long-term due to a condition for which treatment may not be effective. The employee or family member must be under the continuing supervision of, but need not be receiving active treatment by, a health care provider. Examples include Alzheimer's, a severe stroke, or the terminal stages of a disease.

6. Multiple Treatments (Non-Chronic Conditions)

Any period of absence to receive multiple treatments (including any period of recovery therefrom) by a health care provider or by a provider of health care services under orders of, or on referral by, a health care provider, either for restorative surgery after an accident or other injury, or for a condition that would likely result in a period of incapacity² of more than three consecutive calendar days in the absence of medical intervention or treatment, such as cancer (chemotherapy, radiation, etc.), severe arthritis (physical therapy), and kidney disease (dialysis).

APPENDIX C

**KEYSTONE OAKS SCHOOL DISTRICT
FAMILY/MEDICAL LEAVE
SCHEDULE OF EMPLOYEE PERIODIC REPORTS DURING LEAVE**

TO BE COMPLETED BY EMPLOYER

Employees on leave must contact the Payroll Department of Keystone Oaks School District on the first and third Tuesday of each month regarding their status and intention to work.

This form is to be used by the Payroll Department of the District to keep track of the periodic reports by the employee.

Date of Periodic Report	Status of Health Condition	Date of Anticipated Return to Work Periodic Report	Signature of Person Who Conducted
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Employer Remarks

PUPIL PERSONNEL REPORT

November 21, 2013

Mr. Robert Brownlee

BOARD ACTION REQUESTED

I. WESLEY SPECTRUM SERVICES AGREEMENT

The Administration recommends that the Board retroactively approve the *Agreement between Wesley Spectrum Services and the Keystone Oaks School District*, effective on a month-to-month basis commencing October 14, 2013 and expiring on June 16, 2014 at a monthly cost of \$7,200.00.

II. INDEPENDENT SERVICES CONTRACT

The Administration recommends that the Board retroactively approve the *Independent Services Contract (Step-By-Step, Inc.)* for vocational placement for a special education student, effective October 1, 2013 through January 31, 2014 at a cost of \$1,188.00.

PERSONNEL REPORT

November 21, 2013

Ms. Raeann Lindsey

BOARD ACTION REQUESTED

I. RETIREMENT

It is recommended that the Board accept the retirement of **Michael J. Crossey**, special education teacher, who currently is the President of **PSEA**, effective November 27, 2013. Mr. Crossey has been an employee with Keystone Oaks since September 1978.

II. APPOINTMENTS

A. LONG-TERM SUBSTITUTE – COLLEEN REILLY

In compliance with *Board Policy No. 405 – Employment of Substitute Professional Employees*, it is recommended the Board approve **Colleen Reilly**, elementary and special education teacher, Aiken Elementary School, as a long-term substitute, starting November 4, 2013 through May 1, 2014. Ms. Reilly's salary will be \$40,550 (B, Level 16). Ms. Reilly is replacing Ms. Molly Karlovich while she is on a leave of absence.

B. PROJECT SUCCEED

It is recommended that the Board approve **Michael Orsi** as the Special Education instructor for Project Succeed for the balance of the 2013/2014 school year.

C. SUBSTITUTE TEACHERS – 2013/2014

In compliance with *Board Policy No. 405 – Employment of Substitute Professional Employees*, it is recommended the Board approve the following individuals as substitute teachers for the 2013/2014 school year:

Name

Subject

Michael Bosco

Health & Physical Education

Lisa Brestensky

Elementary / Special Education

Susan Tybl

Mathematics 7-12

D. ATHLETIC COACHES

In compliance with the *Keystone Oaks Education Association Agreement 2011-2016*, it is recommended that the Board approve the following individuals as coaches, pending receipt of all legal documents and clearances, for the 2013/2014 school year:

Richard Bonaccorsi	Wrestling Head Coach	\$6,050.00
John Cerminara	Wrestling Assistant Coach	\$2,075.00 (Split)
Michael Ober	Wrestling Assistant Coach	\$2,075.00 (Split)
Andy Bell	Wrestling Coach–Middle School	\$3,025.00
Brett Perry	Wrestling Volunteer Coach	
Mark Schrier	Boys Basketball Assistant Coach	\$3,280.00
James Taylor	6 th Grade Basketball Coach	\$1,940.00

E. ACTIVITIES SPONSORS

In compliance with the Keystone Oaks Education Association Agreement 2011-2016, it is recommended that the Board approve payment to the following individuals:

Shane Hallam	Middle School Musical	\$2,325.00
Nancy Kraemer	Varieties	\$2,950.00

F. PARAPROFESSIONALS

In compliance with **Board Policy No. 504 – Employment of Classified Employees**, and the **Keystone Oaks Education Support Agreement 2009-2014**, it is recommended that the Board retroactively approve the following individuals as paraprofessionals:

Tara Klousnitzer Personal Care Paraprofessional Myrtle Elementary School Effective: October 21, 2013	Desiré Krawchyk Paraprofessional Myrtle Elementary School Effective: October 28, 2013
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III. TENURE

In compliance with **Board Policy No. 404 – Employment of Professional Employees**, it is recommended that the Board retroactively recognize the following individual as having completed the requirements according to the Commonwealth of Pennsylvania and achieving tenure with a Professional Contract:

Nicole Kochanski	Special Education (Autistic Support) Keystone Oaks High/Middle Schools Effective: November 2, 2013
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FINANCE REPORT

November 21, 2013

Mrs. Marian Randazzo and Mr. Gary Alward

BOARD ACTION REQUESTED

I. ACCOUNTS PAYABLE APPROVAL LISTS

The Administration recommends approval of the following Accounts Payable lists as presented in the *Finance Package*:

A. Accounts Payable for October 31, 2013	\$1,226,847.80
B. Food Service Fund Accounts Payable for October 31, 2013	\$84,375.25

II. JOINT PURCHASING AGREEMENT

It is recommended that the Board approve the Keystone Oaks School District's participation in the Allegheny Intermediate Unit Joint Purchasing Board for bid and purchase of supplies for the District, and approve **Christopher Swickline**, high school head custodian, as the regular member for the purposes of this Agreement.

III. PA-EDUCATOR.NET

The Administration recommends the approval of the continued partnership with the PA-Educator.net Clearinghouse at a pro-rated cost of \$1,088.54 for the 2013-2014 school year.

For Information Only

This Clearinghouse is a mechanism used by the District in accepting applications for employment by Professional and Non-Certificated employees via the Internet.

FOR INFORMATION ONLY

I. EXPENDITURE/REVENUE 2013 - 2014 BUDGET to ACTUAL / PROJECTION

ACCT	DESCRIPTION	2013-2014 BUDGET TOTAL	2013-2014 4 MONTH OCTOBER/ACTUAL		OVER (UNDER) BUDGET
Revenue					
6000	Local Revenue Sources	\$ 25,101,155	\$ 23,306,070	\$ -	\$ (1,795,085)
7000	State Revenue Sources	\$ 9,917,008	\$ 3,311,275	\$ -	\$ (6,605,733)
8000	Federal Revenue Sources	\$ 446,504	\$ -	\$ -	\$ (446,504)
Total Revenue		\$ 35,464,667	\$ 26,617,345	\$ -	\$ (8,847,322)
					(OVER) UNDER BUDGET
Expenditures					
100	Salaries	\$ 14,673,483	\$ 2,823,602		\$ 11,849,881
200	Benefits	\$ 7,848,904	\$ 1,889,791		\$ 5,959,113
300	Professional/Technical Services	\$ 1,060,408	\$ 245,020		\$ 815,388
400	Property Services	\$ 1,468,919	\$ 518,695		\$ 950,224
500	Other Services	\$ 4,208,192	\$ 1,272,409		\$ 2,935,783
600	Supplies/Books	\$ 1,419,255	\$ 815,927		\$ 603,328
700	Equipment/Property	\$ 111,475	\$ 18,015		\$ 93,460
800	Other Objects	\$ 1,441,760	\$ 1,048,479		\$ 393,281
900	Other Financial Uses	\$ 3,703,500	\$ 3,080,450		\$ 623,050
Total Expenditures		\$ 35,935,896	\$ 11,712,386	\$ -	\$ 24,223,510
Expenditures exceeding Revenues		\$ (471,229)	\$ 14,904,959	\$ -	\$ 15,376,188

**II. CASH, CASH EQUIVALENTS AND RELATED INTEREST INCOME AS OF
October 31, 2013**

	9/30/2013				10/31/2013
	ENDING	DEBIT	CREDIT	INTEREST	ENDING
	BALANCE	RECEIVED	DISBURSED	INCOME	BALANCE
GENERAL FUND					
PNC BANK	\$ 13,966,082	\$ 1,205,551	\$ (3,929,906)	\$ 2,210	\$ 11,243,937
PLGIT	\$ 8,611,941	\$ 1,496,808	\$ -	\$ 103	\$ 10,108,853
PSDLAF -interest paid quarterly	\$ 153,700		\$ -	\$ -	\$ 153,700
INVEST PTOGRAM	\$ 170,649			\$ 7	\$ 170,656
	<u>\$ 22,902,372</u>	<u>\$ 2,702,359</u>	<u>\$ (3,929,906)</u>	<u>\$ 2,321</u>	<u>\$ 21,677,146</u>
CAFETERIA FUND					
PNC BANK	\$ 72,538	\$ 65,559	\$ (109,386)		\$ 28,712
PLGIT	\$ 237,968	\$ -	\$ -	\$ 3	\$ 237,971
	<u>\$ 310,506</u>	<u>\$ 65,559</u>	<u>\$ (109,386)</u>	<u>\$ 3</u>	<u>\$ 266,682</u>
CONSTRUCTION FUND / CAP RESERVE					
PNC BANK	\$ 224,333	\$ -	\$ -	\$ 10	\$ 224,342
GRAND TOTAL	<u>\$ 23,437,211</u>	<u>\$ 2,767,918</u>	<u>\$ (4,039,292)</u>	<u>\$ 2,333</u>	<u>\$ 22,168,171</u>

III. SUMMARY OF STUDENT ACTIVITIES ACCOUNTS AS OF OCTOBER 31, 2013

Bank Account - Status	Middle / High School	Athletics
Cash Balance as of September 30, 2013	\$ 123,044.09	\$ 60,755.78
Deposits (General Fund Transfer)	\$ 2,135.00	\$ 6,139.00
Subtotal	\$ 125,179.09	\$ 66,894.78
Expenditures	\$ 7,217.55	\$ 6,545.71
Cash Balance as of October 31, 2013	\$ 117,961.54	\$ 60,349.07

FACILITIES REPORT

November 21, 2013

Mrs. Marian Randazzo & Mr. Gary Alward

BOARD ACTION REQUESTED

I. HIGH SCHOOL AND MIDDLE SCHOOL SITE IMPROVEMENTS

It is recommended that the Board approve **Nira Consulting Engineers, Inc.** to identify a definitive scope of the work to be performed and the estimated cost of construction for the improvements to the driveways and parking areas, replacement of the curbs, walkways and exterior stairways. The cost for this service will be \$2,500.00.

II. SWIM PROGRAM

The Administration recommends the approval of the *Recreational and Community Swim Program* fees, rental fees, pool staff pay rates and the pool staff for the 2013/2014 school year as follows:

Program Fees

Family Pass (2 adults and 3 kids)	\$ 60.00
Adult Pass	\$ 30.00
Student Pass	\$ 15.00
Daily Admission Fee – Resident	\$ 2.00
Daily Admission Fee – Non Resident	\$ 4.00
Children Swim Lessons (6 lessons)	\$ 35.00
Preschool Swim Lessons (5 lessons)	\$ 25.00
Lifeguard Training (includes first aid and CPR)	\$200.00
Water Aerobics (20 classes)	\$ 70.00
Water Safety Instructor Training	\$195.00
CPR for the Professional Rescuer classes	\$ 50.00
Other Programs in response to need	TBA

Rental Fees

Residents (Copy of photo ID with permit; compared on day of rental)

Residents (1-30 people)	\$ 50.00/hr
Residents (31-60 people)	\$ 55.00/hr

Non-Residents

Non Resident (1-30 people)	\$ 75.00/hr
Non Resident (31-60 people)	\$ 80.00/hr

Pool Staff Pay Rates

Water Aerobics Instructors	\$20.00/hr
Adult Supervising Instructor (WSI)	\$14.00/hr
Instructors with WSI	\$10.00/hr
Student Instructors without WSI	\$ 7.25/hr
Adult Program Supervisor	\$10.00/hr
Lifeguards	\$ 7.25/hr

Pool Staff

**Jacob Cofini
Zachary Cofini
Rachel Constantini
Joanne Dressler
Kaitlin Flaherty
Kathleen Guglielmi
Kevin Koontz
Mike Lydon
Jacob Maley**

**Tom McMullen
Lori Oleksak
Zach Olsen
Jakeb Pagesh
Jana Pahler
April Ramsey
Janet Russo
Amy Torcaso**

ACTIVITIES REPORT

November 21, 2013

Mr. Dan Domalik

BOARD ACTION REQUESTED

I. OVERNIGHT TRIP / COMPETITION

Keystone Oaks Dance Team

Covington, Kentucky

Friday-Sunday – February 14 – 16, 2014

Sponsors– **Megan Kamberis**

Chaperones – Names to be announced and submitted to the Superintendent

Approximate number of students participating: 15

Approximate cost per student - \$300.00 - \$400.00

No District funds requested