KEYSTONE OAKS SCHOOL DISTRICT
1000 Kelton Avenue
Pittsburgh, PA 15216

BOARD OF SCHOOL DIRECTORS

BUSINESS/LEGISLATIVE MEETING

THURSDAY, OCTOBER 17, 2013
7:00 PM
KEYSTONE OAKS SCHOOL DISTRICT
SCHOOL DIRECTORS’ CALENDAR OF COMING EVENTS

October 17, 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

November 14, 2013 – Work Session

7:00 PM Meeting

- Call to Order – President
- Pledge of Allegiance
- Mr. Aaron Smith – Director of Technology
- Review of Reports
- Public Comment (Any Topic)
- Adjournment
BOARD ACTION REQUESTED

I. BOARD MINUTES

It is recommended that the Board approve the Special Voting Minutes of September 4, 2013, the Work Session Minutes of September 12, 2013, and the Business/Legislative Minutes of September 19, 2013, as enclosed.

FOR INFORMATION ONLY

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

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

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

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

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

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

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

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

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

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

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

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

In accordance with Board Policy No. 011, the Administration recommends the FIRST READING of revised Policy No. 835: Family and Medical Leave.
VII. PROFESSIONAL DEVELOPMENT

The Administration recommends approval of the following conference requests:

Beth Salimbene  Building Auditory and Social Learning Skills
Kelly Tolley  Crowne Plaza South
             Pittsburgh, PA 15241

Cindy Mentzer  PA Speech & Debate Association
               26th Annual Conference
               The Atherton Hotel
               State College, PA 16802

FOR INFORMATION ONLY

I. EXECUTIVE SESSION REPORT
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

Board of School Directors

Solicitor

Superintendent

Director of Buildings and Grounds
Director of Food Service
Director of Technology
Director of Fiscal Services
Communication Specialist
School Resource Officer and Safety Coordinator

Assistant Superintendent Curriculum / Instruction and Special Education/ Pupil Services

Board Secretary
Recording Secretary
Treasurer

Adopted: August 21, 1989
Revised: November 17, 2011
November 16, 2009; August 1998

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Assistant Superintendent
Curriculum / Instruction and
Special Education / Pupil Services

Finance Assistant
and Child Accounting Clerk

Principals K-12

Coordinator of
Pupil Services

PIMS/
Technology
Secretary

Central Office Receptionist /
Registrar

Administrative Assistant
**KEYSTONE OAKS SCHOOL DISTRICT**

**Policy Guide**

<table>
<thead>
<tr>
<th>Policy No.</th>
<th>201</th>
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<tbody>
<tr>
<td>Section</td>
<td>PUPILS</td>
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<tr>
<td>Title</td>
<td>ADMISSION OF BEGINNERS STUDENTS</td>
</tr>
<tr>
<td>Adopted</td>
<td>AUGUST 21, 1989</td>
</tr>
<tr>
<td>Revised</td>
<td>MAY 21, 2001</td>
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</tbody>
</table>

### POLICY NO. 201
ADMISSION OF BEGINNERS STUDENTS

1. **Purpose**
   The Board shall establish age requirement for the admission of beginners which are consistent with statute and sound educational practice and which insure the equitable treatment of all eligible children. law and regulations.

2. **Authority**

   #### A. Beginners
   Beginners are children entering 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.

   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.
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 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 before September 1.

3. Guidelines

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.
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.

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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 not met the age requirement (see above) shall be evaluated for readiness and developmental skills through 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.

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.

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### POLICY NO. 233
**SUSPENSION AND EXPULSION**

<table>
<thead>
<tr>
<th>1. Purpose</th>
<th>The Board recognizes that exclusion from the educational program of the schools, whether by suspension or expulsion, is the most severe sanction that can be imposed on a student in this District and one that cannot be imposed without due process. The Board may, after a proper hearing, suspend or expel a child student for such time as it deems necessary, or may permanently expel a student.</th>
</tr>
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<tbody>
<tr>
<td>2. Authority</td>
<td>The Board recognizes the rules governing student conduct in school and during the time spent in travel to and from school. Such rules require that students:</td>
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<td></td>
<td>a. conform to reasonable standards of socially acceptable behavior;</td>
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<td>b. respect the rights, person and property of others;</td>
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</table>

Exclusions affecting students with disabilities shall be governed by applicable state and federal law and regulations.
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.

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

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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; Sec. 12.1 (b)

b. sufficient notice of the time and place 42 PA. C.S.

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;
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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;
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

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
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<tbody>
<tr>
<td><strong>Exclusion from School – Suspension</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>No Student May be Suspended Without Notice</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Informal Hearing</strong></td>
<td>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. Information hearings under this provision shall be conducted by the building principal.</td>
</tr>
<tr>
<td><strong>Purpose of Informational Hearing</strong></td>
<td>The purpose of the informal hearing is to permit the student to explain the circumstances</td>
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</tbody>
</table>
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

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

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
POLICY NO. 233
SUSPENSION AND EXPULSION

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.

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.
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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 nearing 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

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.
| 4. Delegation of Responsibility | POLICY NO. 233  
SUSPENSION AND EXPULSION |
<table>
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<tbody>
<tr>
<td>The Superintendent or designee shall develop procedures to implement this policy, which will include:</td>
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<tr>
<td>1. Publication of a Discipline Code, in accordance with Board policy on student discipline.</td>
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<td>2. Procedures that ensure due process when a student is being deprived of the right to attend school.</td>
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<td>3. Regulations regarding student records which require that records of disciplinary suspension be maintained in accordance with Board policy on student records.</td>
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<tr>
<td>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 designated by code.</td>
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<tr>
<td>5. Any student who has been expelled may apply for readmission to school upon such conditions as may be imposed by the Board.</td>
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</table>
# Policy No. 808
## FOOD SERVICES

### 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**.

### 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.

### 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 Services**.

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.

To reinforce the District’s nutrition education program, foods served in school cafeterias shall:

1. Be carefully selected to contribute to...
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.

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 [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 or health hazards.

SC 504

2. The purchase of perishable foodstuffs, seasonal commodities and other supplies.

SC 504, 1337

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.
### POLICY NO. 826
#### RECORDS MANAGEMENT PLAN

**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.

**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.

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.

The District shall make a good faith effort to comply with all proper requests for record production.
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.
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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POLICY NO. 826
RECORDS MANAGEMENT PLAN

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
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 police and this schedule.
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

<table>
<thead>
<tr>
<th>Record Description</th>
<th>Record Format</th>
<th>Retention Period (in years)</th>
<th>Disposal Code</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Administrative Records</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Feasibility Studies</td>
<td>A, C</td>
<td>3</td>
<td>1, 4</td>
</tr>
<tr>
<td>PSSA Results</td>
<td>A, C</td>
<td>Permanent</td>
<td>3</td>
</tr>
<tr>
<td>Public Record Requests</td>
<td>A, C</td>
<td>1 from date received(^1)</td>
<td>1, 4</td>
</tr>
<tr>
<td>School District Report Cards</td>
<td>A, C</td>
<td>Permanent</td>
<td>3</td>
</tr>
<tr>
<td>Strategic Plan</td>
<td>A, C</td>
<td>One (1) copy permanent</td>
<td>3</td>
</tr>
<tr>
<td><strong>Benefits / Insurance Records(^2)</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Claims</td>
<td>A, C</td>
<td>6 after settlement</td>
<td>2, 4</td>
</tr>
<tr>
<td>COBRA Records</td>
<td>A, C</td>
<td>6(^3)</td>
<td></td>
</tr>
<tr>
<td>Enrollment Forms</td>
<td>A, C</td>
<td>Term of benefits plus 6</td>
<td>2, 4</td>
</tr>
<tr>
<td>Policies / Plans / Contracts</td>
<td>A, C</td>
<td>6 after expiration</td>
<td>1, 4</td>
</tr>
<tr>
<td><strong>Child Labor Records</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Applications for Work Permits</td>
<td>A, C</td>
<td>2 after graduation(^4)</td>
<td>2, 4</td>
</tr>
</tbody>
</table>
### RECORDS RETENTION SCHEDULE – (Page 17 of 29)

<table>
<thead>
<tr>
<th>Record Description</th>
<th>Record Format</th>
<th>Retention Period (in years)</th>
<th>Disposal Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employment Report from Employer</td>
<td>A, C</td>
<td>2&lt;sup&gt;5&lt;/sup&gt;</td>
<td>2, 4</td>
</tr>
<tr>
<td><strong>Complaints / Challenges</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Investigation Records</td>
<td>A, C, D, E, F</td>
<td>6 after final resolution</td>
<td>2, 4</td>
</tr>
<tr>
<td>Made by District Employee(s)</td>
<td>A, C</td>
<td>6 after final resolution&lt;sup&gt;6&lt;/sup&gt;</td>
<td>2, 4</td>
</tr>
<tr>
<td>Regarding District Employee(s)</td>
<td>A, C</td>
<td>6 after employment ends</td>
<td>2, 4</td>
</tr>
<tr>
<td>Regarding Instructional Materials or District Programs</td>
<td>A, C</td>
<td>6 after final resolution</td>
<td>1, 4</td>
</tr>
<tr>
<td><strong>District Organization Records</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>District Boundaries / Attendance Areas</td>
<td>A, C, E</td>
<td>Permanent</td>
<td>3</td>
</tr>
<tr>
<td>Photographs / Movies of Historical Value</td>
<td>C, D, F</td>
<td>Permanent</td>
<td>3</td>
</tr>
<tr>
<td><strong>Employment Contracts</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Administrative Compensation Plan</td>
<td>A, B, C</td>
<td>One (1) copy permanent</td>
<td>3</td>
</tr>
<tr>
<td>Collective Bargaining Agreements</td>
<td>A, B, C</td>
<td>One (1) copy permanent</td>
<td>3</td>
</tr>
<tr>
<td>Individual Employment Contracts/ Board Resolutions</td>
<td>A, C</td>
<td>4 after employment ends</td>
<td>1, 4</td>
</tr>
<tr>
<td>Record Description</td>
<td>Record Format</td>
<td>Retention Period (in years)</td>
<td>Disposal Code</td>
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<tr>
<td>Facility Use Records</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Applications</td>
<td>A, C</td>
<td>6</td>
<td>1, 4</td>
</tr>
<tr>
<td>Fee Schedule(s)</td>
<td>A, C</td>
<td>Current</td>
<td>1, 4</td>
</tr>
<tr>
<td>Financial Records</td>
<td></td>
<td></td>
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<tr>
<td>Accounts Payable</td>
<td>A, C</td>
<td>6</td>
<td>1, 4</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>A, C</td>
<td>6</td>
<td>1, 4</td>
</tr>
<tr>
<td>Adopted Annual Budget</td>
<td>A, B, C</td>
<td>10</td>
<td>1, 4</td>
</tr>
<tr>
<td>Annual Financial Reports</td>
<td>A, B, C</td>
<td>Permanent</td>
<td>3</td>
</tr>
<tr>
<td>Annual Audit Reports</td>
<td>A, B, C</td>
<td>Permanent</td>
<td>3</td>
</tr>
<tr>
<td>Bank Statements</td>
<td>A, C</td>
<td>6</td>
<td>1, 4</td>
</tr>
<tr>
<td>Check Registers</td>
<td>A, C</td>
<td>6</td>
<td>1, 4</td>
</tr>
<tr>
<td>Deposit Slips</td>
<td>A, C</td>
<td>6</td>
<td>1, 4</td>
</tr>
<tr>
<td>General Ledger</td>
<td>A, B, C</td>
<td>Permanent</td>
<td>3</td>
</tr>
<tr>
<td>Record Description</td>
<td>Record Format</td>
<td>Retention Period (in years)</td>
<td>Disposal Code</td>
</tr>
<tr>
<td>-------------------------------</td>
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</tr>
<tr>
<td>Grant Records (Successful)</td>
<td>A, C</td>
<td>6 after close of grant</td>
<td>1, 4</td>
</tr>
<tr>
<td>Investment Records</td>
<td>A, B, C</td>
<td>6 after cancellation</td>
<td>1, 4</td>
</tr>
<tr>
<td>Purchase Orders / Invoices</td>
<td>A, C</td>
<td>6</td>
<td>1, 4</td>
</tr>
<tr>
<td>Tax Collection Records</td>
<td>A, C</td>
<td>6</td>
<td>1, 4</td>
</tr>
<tr>
<td>Free and Reduced Lunch Program Records</td>
<td></td>
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</tr>
<tr>
<td>Accounts / Audits</td>
<td>A, C</td>
<td>3 – 5</td>
<td>1, 4</td>
</tr>
<tr>
<td>Application for Participation</td>
<td>A, C</td>
<td>3 – 5</td>
<td>2, 4</td>
</tr>
<tr>
<td>Program Requirements</td>
<td>A, C</td>
<td>3 – 5</td>
<td>1, 4</td>
</tr>
<tr>
<td>Grievances / Arbitrations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Complaint</td>
<td>A, B, C</td>
<td>Permanent</td>
<td>3</td>
</tr>
<tr>
<td>District Response</td>
<td>A, B, C</td>
<td>Permanent</td>
<td>3</td>
</tr>
<tr>
<td>Final Ruling / Decision of Arbitrator</td>
<td>A, B, C</td>
<td>Permanent</td>
<td>3</td>
</tr>
<tr>
<td>Record Description</td>
<td>Record Format</td>
<td>Retention Period (in years)</td>
<td>Disposal Code</td>
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<tr>
<td>------------------------------------------------</td>
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</tr>
<tr>
<td><strong>Litigation Files</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Pleadings, Motions, Briefs, Other Filings</td>
<td>A, B, C</td>
<td>7 after final conclusion of litigation</td>
<td>1, 4</td>
</tr>
<tr>
<td>Decision / Ruling</td>
<td>A, B, C</td>
<td>7 after final conclusion of litigation</td>
<td>1, 4</td>
</tr>
<tr>
<td><strong>Medical Records</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Medical Documentation (Employee Leave, Accommodations)</td>
<td>A, C</td>
<td>6 after employment ends</td>
<td>2, 4</td>
</tr>
<tr>
<td>Medical Records / Information (Employee)</td>
<td>A, C, D, E</td>
<td>6 after employment ends&lt;sup&gt;9&lt;/sup&gt;</td>
<td>2, 4</td>
</tr>
<tr>
<td>Medical Records / Information (Employee Exposure to Toxic/Harmful Substances)</td>
<td>A, C, D, F</td>
<td>30 after employment ends&lt;sup&gt;10&lt;/sup&gt;</td>
<td>2, 4</td>
</tr>
<tr>
<td>Medical Records / Information (Students)</td>
<td>A, C, D, F</td>
<td>2 after enrollment ends&lt;sup&gt;11&lt;/sup&gt;</td>
<td>2, 4</td>
</tr>
<tr>
<td>Pre-Employment Medical Examination&lt;sup&gt;12&lt;/sup&gt;</td>
<td>A, C, D, F</td>
<td>2 after enrollment ends&lt;sup&gt;11&lt;/sup&gt;</td>
<td>2, 4</td>
</tr>
<tr>
<td><strong>Payroll Records</strong>&lt;sup&gt;14&lt;/sup&gt;</td>
<td></td>
<td></td>
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<tr>
<td>Deduction Authorizations</td>
<td>A, C</td>
<td>6</td>
<td>2, 4</td>
</tr>
<tr>
<td>Direct Deposit Forms</td>
<td>A, C</td>
<td>6</td>
<td>2, 4</td>
</tr>
<tr>
<td>Record Description</td>
<td>Record Format</td>
<td>Retention Period (in years)</td>
<td>Disposal Code</td>
</tr>
<tr>
<td>------------------------------------------------------</td>
<td>---------------</td>
<td>---------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Employee Earnings Statements (Pay Stubs)</td>
<td>A, C</td>
<td>$6^{15}$</td>
<td>2, 4</td>
</tr>
<tr>
<td>Time Cards / Sheets</td>
<td>A, C</td>
<td>$6^{16}$</td>
<td>1, 4</td>
</tr>
<tr>
<td>Wage and Tax Statements (W-2 Forms)</td>
<td>A, C</td>
<td>$6^{17}$</td>
<td>2, 4</td>
</tr>
<tr>
<td>Withholding Allowance Certificates (W-4 Forms)</td>
<td>A, C</td>
<td>6 after superseded OR employment ends$^{18}$</td>
<td>2, 4</td>
</tr>
<tr>
<td><strong>Personnel Records$^{19}$</strong></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Acknowledgement of Receipt (Handbooks / Policies)</td>
<td>A, C</td>
<td>6 after superseded OR employment ends</td>
<td>1, 4</td>
</tr>
<tr>
<td>Advertised Job Openings / Postings</td>
<td>A, C</td>
<td>4 after position filled$^{20}$</td>
<td>1, 4</td>
</tr>
<tr>
<td>Attendance Records (Employees)</td>
<td>A, C</td>
<td>6 after employment ends</td>
<td>1, 4</td>
</tr>
<tr>
<td>Background Check Documentation$^{21}$</td>
<td>A, C</td>
<td>6 after employment ends</td>
<td>2, 4</td>
</tr>
<tr>
<td>Change(s) in Status (Promotion / Transfer / Furlough / Recall)</td>
<td>A, C</td>
<td>6 after employment ends$^{22}$</td>
<td>2, 4</td>
</tr>
<tr>
<td>Continuing Education / Professional Development</td>
<td>A, C</td>
<td>6 after employment ends</td>
<td>2, 4</td>
</tr>
<tr>
<td>Credentials (Certificates / Licenses)</td>
<td>A, C</td>
<td>6 after employment ends</td>
<td>1, 4</td>
</tr>
<tr>
<td>Discipline Records (Employees)</td>
<td>A, C</td>
<td>6 after employment ends</td>
<td>2, 4</td>
</tr>
<tr>
<td>Record Description</td>
<td>Record Format</td>
<td>Retention Period (in years)</td>
<td>Disposal Code</td>
</tr>
<tr>
<td>--------------------------------------------------------</td>
<td>---------------</td>
<td>-------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Employment Application / Resume (Hired)</td>
<td>A, C</td>
<td>6 after employment ends</td>
<td>2, 4</td>
</tr>
<tr>
<td>Employment Application / Resume (Not Hired)</td>
<td>A, C</td>
<td>4 after position filled(^{23})</td>
<td>2, 4</td>
</tr>
<tr>
<td>Employment Eligibility Verification (Form I-9 and Documentation)</td>
<td>A, C</td>
<td>6 after employment ends(^{24})</td>
<td>2, 4</td>
</tr>
<tr>
<td>Equal Employment Opportunity Reports and Demographics</td>
<td>A, C</td>
<td>3(^{25})</td>
<td>1, 4</td>
</tr>
<tr>
<td>Evaluation (Employees)</td>
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<td>7 after claim closed(^{42})</td>
<td>2, 4</td>
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</table>
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).

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

PDE recommendation — FAQs for PA Child Labor Law.

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

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

SC 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.

7 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 in excess of 5 years.

29 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 results 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.

29 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.

SC 1409, 28 PA Code Sec. 23.55.

42 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.

29 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 results 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.

29 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 29 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 29 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.
PHMC recommendation for municipal governments — administrative and legal — contract files.

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

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

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.

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

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.

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).

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

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

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

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

SCS recommendation.
POLICY NO: 335-835
FAMILY AND MEDICAL LEAVE

This Policy supersedes Policies 335 and 435

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.

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.

29 USCA § 2601 et seq.

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.

3. Guidelines

Required notices shall be posted by the District.
POLICY NO. 335-835
FAMILY AND MEDICAL LEAVE

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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FAMILY AND MEDICAL LEAVE

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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FAMILY AND MEDICAL LEAVE

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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FAMILY AND MEDICAL LEAVE

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 as...
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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...
POLICY NO. 335-835
FAMILY AND MEDICAL LEAVE

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.
POLICY NO. 335-835
FAMILY AND MEDICAL LEAVE

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
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

<table>
<thead>
<tr>
<th>TO BE COMPLETED BY EMPLOYEE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Name of employee (First Name, Middle Initial, Last Name).</td>
<td>2. Employee’s position</td>
</tr>
<tr>
<td>3. Reason for requested leave:</td>
<td></td>
</tr>
<tr>
<td>a. (  ) Birth of a son or daughter of the employee in order to care for such son or daughter.</td>
<td></td>
</tr>
<tr>
<td>b. (  ) Placement of a son or daughter with employee for adoption or foster care.</td>
<td></td>
</tr>
<tr>
<td>c. (  ) In order to care for a spouse, child or parent (“covered relation”) with a serious health condition.</td>
<td></td>
</tr>
<tr>
<td>d. (  ) 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)</td>
<td></td>
</tr>
<tr>
<td>4. If “c,” please check one:</td>
<td></td>
</tr>
<tr>
<td>(  ) Spouse</td>
<td></td>
</tr>
<tr>
<td>(  ) Child</td>
<td></td>
</tr>
<tr>
<td>(  ) Parent</td>
<td></td>
</tr>
<tr>
<td>5. If “c,” state name and address of relation.</td>
<td></td>
</tr>
<tr>
<td>6. Date on which you wish leave to commence.</td>
<td>7. Date of anticipated return to work.</td>
</tr>
<tr>
<td>8. Are you requesting leave on an intermittent or reduced leave schedule?</td>
<td></td>
</tr>
<tr>
<td>(  ) Yes (  ) No</td>
<td></td>
</tr>
<tr>
<td>9. If yes, please give schedule of when you anticipate you will be unavailable for work.</td>
<td></td>
</tr>
</tbody>
</table>
**APPENDIX B**

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

<table>
<thead>
<tr>
<th>I. Employee's Name</th>
<th>2. Patient’s Name (If different from employee)</th>
</tr>
</thead>
</table>

3. The attached sheet describes what is meant by a “serious health condition” under the Family and Medical Leave Act. Does the patient’s condition 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 incapacity 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 incapacitated and the likely duration and frequency of episodes of incapacity:

---

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 incapacity or subsequent treatment in connection with or consequent to such inpatient care.

2. **Absence Plus Treatment**
   
   (a) A period of incapacity of more than three consecutive calendar days (including any subsequent treatment or period of incapacity relating to the same condition), that also involves:

   (1) Treatment 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 treatment 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 incapacity (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 incapacity 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 incapacity 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.

<table>
<thead>
<tr>
<th>Date of Periodic Report</th>
<th>Status of Health Condition</th>
<th>Date of Anticipated Return to Work Periodic Report</th>
<th>Signature of Person Who Conducted</th>
</tr>
</thead>
</table>

Employer Remarks

Page 22 of 22
FOR INFORMATION ONLY

I. SCHOOL PERFORMANCE PROFILE

II. READ 180 – KEYSTONE OAKS MIDDLE SCHOOL

III. ELEMENTARY MATH

IV. AEDs & NEW LEGISLATION
BOARD ACTION REQUESTED

I. APPOINTMENTS

A. PROFESSIONAL EMPLOYEE

In compliance with Board Policy No. 404 – Employment of Professional Employees, and the Keystone Oaks Education Association Agreement 2011/2016, the Administration recommends the employment of the following individual:

Kelly McGuire – Keystone Oaks Middle School
Remedial Language Arts Teacher
Salary - $ 40,550 (B, Level 16)
Retroactive to August 22, 2013

B. AFTER SCHOOL TUTORING PROGRAM

It is recommended that the Board approve the following individuals to participate in the After School Tutoring Program at Aiken, Dormont, and Myrtle Elementary Schools. The range of pay for the individuals is between $26.40 and $42.37 per period based on years of service to the District:

<table>
<thead>
<tr>
<th>Aiken Elementary</th>
<th>Dormont Elementary</th>
<th>Myrtle Elementary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sandra McCann</td>
<td>Jamie Barbin</td>
<td>Marilyn Kennedy</td>
</tr>
<tr>
<td>Meghan O’Brien</td>
<td>Kristen Leitch</td>
<td>Nancy Jean Morrison</td>
</tr>
<tr>
<td>William Opperman</td>
<td>Hope Muno</td>
<td>Lauren Obringer</td>
</tr>
<tr>
<td>Kate Sobocinski</td>
<td>Ashley Todd</td>
<td>Mary Poe</td>
</tr>
<tr>
<td></td>
<td>Judy Tredway</td>
<td>Cari Worley</td>
</tr>
<tr>
<td></td>
<td>Lisa Waskiewicz</td>
<td>Nicole Niccolai</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Teresa Zimmerman</td>
</tr>
</tbody>
</table>

For Information Only

The After School Tutoring Program is supported through the Accountability Block Grant.
C. CYBER SCHOOL PROGRAM

In compliance with the *Keystone Oaks Education Association Agreement 2011/2016*, it is recommended that the Board approve John Buffington as a Cyber School science teacher for the 2013-2014 school year.

The range of pay is between $26.40 and $42.37 per period based on years of service to the District.

D. ACTIVITIES SPONSORS

In compliance with the Keystone Oaks Education Association Agreement 2011/2016, it is recommended that the Board approve the following individuals as sponsors for the 2013/2014 school year:

<table>
<thead>
<tr>
<th>Name</th>
<th>Activity</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jennifer Chambers</td>
<td>Students In Action</td>
<td>$1,300.00</td>
</tr>
<tr>
<td>Kelly Diven</td>
<td>Intramurals – Myrtle</td>
<td>$2,200.00</td>
</tr>
<tr>
<td>Diane Flaherty</td>
<td>PJAS – Assistant</td>
<td>$1,650.00</td>
</tr>
<tr>
<td>Nadine Pisani</td>
<td>PJAS – High School</td>
<td>$2,950.00</td>
</tr>
<tr>
<td>Ben Stewart</td>
<td>PJAS – Middle School</td>
<td>$3,050.00</td>
</tr>
</tbody>
</table>

E. FOOD SERVICE

In compliance with *Board Policy No. 504 – Employment of Classified Employees*, it is recommended that the Board approve the following individual as a Food Service employee for the 2013/2014 school year effective September 23, 2013:

<table>
<thead>
<tr>
<th>Name</th>
<th>School</th>
<th>Hourly Wage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jodi Hoffman</td>
<td>High School</td>
<td>$8.75</td>
</tr>
</tbody>
</table>

F. CORRECTED HOURLY SALARY INCREASE

It is recommended that the Board approve the following hourly increase for the listed individuals who are employed in the Food Service Department:

<table>
<thead>
<tr>
<th>Name</th>
<th>From</th>
<th>To</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ryan Briggs</td>
<td>$16.00</td>
<td>$17.00</td>
</tr>
<tr>
<td>Production Manager</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

| Jennifer Lashley | $12.00 | $13.00 |
| Head Cook        |
G. SUBSTITUTE PROFESSIONALS

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

Christine Bolton  Elementary K-6
Jamie Ford  Elementary Guidance Counselor
Robert Gunby  Elementary K-6
Kelsie Plummer  Early Childhood K-3
Alex Romanias  Health & Physical Education
Ashley Thiebaud  Elementary / Special Education
Kelsie Plummer  Early Childhood K-3

H. SUBSTITUTE CUSTODIAN

In compliance with Board Policy No. 505 – Employment of Substitute and Short-Term Employees, it is recommended that the Board approve Joseph Ruffalo as a substitute custodian, retroactive to September 30, 2013.

II. EXTRA DUTY COMPENSATION

A. ATHLETIC EMPLOYEES

In compliance with the Keystone Oaks Educational Association 2011/2016, Article XXVII, Athletic Positions and Compensation, it is recommended that the Board authorize extra-duty compensation (payable in February) to the following individuals:

<table>
<thead>
<tr>
<th>Sport</th>
<th>Status</th>
<th>Coach</th>
<th>Stipend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Basketball (Boys)</td>
<td>Head Coach</td>
<td>Anthony Cherico</td>
<td>$6,050.00</td>
</tr>
<tr>
<td></td>
<td>Assistant</td>
<td>Brian Partyka</td>
<td>$3,895.00</td>
</tr>
<tr>
<td></td>
<td>Assistant</td>
<td>Jim Taylor</td>
<td>$3,280.00</td>
</tr>
<tr>
<td></td>
<td>8th Grade</td>
<td>Keith Buckley</td>
<td>$2,970.00</td>
</tr>
<tr>
<td></td>
<td>7th Grade</td>
<td>Andy Bochicchio</td>
<td>$2,970.00</td>
</tr>
<tr>
<td></td>
<td>6th Grade</td>
<td>Open</td>
<td>$1,940.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Basketball (Girls)</td>
<td>Head Coach</td>
<td>Nikki Presto</td>
<td>$6,050.00</td>
</tr>
<tr>
<td></td>
<td>Assistant</td>
<td>Bill Isbir</td>
<td>$1,947.50</td>
</tr>
<tr>
<td></td>
<td>Assistant</td>
<td>Chris Walker</td>
<td>$1,947.50</td>
</tr>
<tr>
<td></td>
<td>Freshman</td>
<td>Maria Costanza</td>
<td>$3,280.00</td>
</tr>
<tr>
<td></td>
<td>8th Grade</td>
<td>Keith Buckley</td>
<td>$2,970.00</td>
</tr>
<tr>
<td></td>
<td>7th Grade</td>
<td>Andy Bochicchio</td>
<td>$2,970.00</td>
</tr>
<tr>
<td></td>
<td>6th Grade</td>
<td>John Hoffman</td>
<td>$1,940.00</td>
</tr>
<tr>
<td>Sports</td>
<td>Position</td>
<td>Name</td>
<td>Compensation</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------------</td>
<td>------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Swimming (B&amp;G)</td>
<td>Head Coach</td>
<td>Bill Straw</td>
<td>$5,535.00</td>
</tr>
<tr>
<td></td>
<td>*Assistant</td>
<td>Adriann Grand</td>
<td>$3,890.00</td>
</tr>
<tr>
<td>Wrestling</td>
<td>Head Coach</td>
<td>Open</td>
<td>$6,050.00</td>
</tr>
<tr>
<td></td>
<td>Assistant</td>
<td>Rich Bonaccorsi</td>
<td>$4,150.00</td>
</tr>
<tr>
<td></td>
<td>Freshman Assistant</td>
<td>Steve McCormick</td>
<td>$3,280.00</td>
</tr>
<tr>
<td></td>
<td>Middle School</td>
<td>Jared Shields</td>
<td>$3,025.00</td>
</tr>
<tr>
<td></td>
<td>Middle School</td>
<td>CJ Seitzinger</td>
<td>$3,025.00</td>
</tr>
<tr>
<td></td>
<td>6th Grade</td>
<td>Mark Hutchin</td>
<td>$1,945.00</td>
</tr>
</tbody>
</table>

* Incorrect compensation on the Business/Legislative Agenda for August 15, 2013.
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 September 30, 2013 $768,837.22

B. Food Service Fund Accounts Payable for September 30, 2013 $66,534.56

II. PITNEY BOWES – PUPIL SERVICES OFFICE

The Administration recommends that the Board approve a 60-month lease with Pitney Bowes for a postage meter at a cost of $44.00 per month for the Pupil Services Office due to the high volume of confidential mailings, effective immediately.
### III. EXPENDITURE/REVENUE 2013 - 2014 BUDGET to ACTUAL / PROJECTION

<table>
<thead>
<tr>
<th>ACCT</th>
<th>DESCRIPTION</th>
<th>TOTAL</th>
<th>SEPTEMBER/ACTUAL</th>
<th>BUDGET</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>2013-2014</td>
<td>2013-2014 BUDGET</td>
<td>OVER</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BUDGET</td>
<td>3 MONTH</td>
<td>(UNDER)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6000</td>
<td>Local Revenue Sources</td>
<td>$25,101,155</td>
<td>$22,116,949</td>
<td>$2,984,206</td>
</tr>
<tr>
<td>7000</td>
<td>State Revenue Sources</td>
<td>$9,917,008</td>
<td>$1,704,968</td>
<td>$8,212,040</td>
</tr>
<tr>
<td>8000</td>
<td>Federal Revenue Sources</td>
<td>$446,504</td>
<td></td>
<td>$446,504</td>
</tr>
<tr>
<td></td>
<td>Total Revenue</td>
<td>$35,464,667</td>
<td>$23,821,917</td>
<td>$(11,642,750)</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>100</td>
<td>Salaries</td>
<td>$14,673,483</td>
<td>$1,654,261</td>
<td>$13,019,222</td>
</tr>
<tr>
<td>200</td>
<td>Benefits</td>
<td>$7,848,904</td>
<td>$1,275,965</td>
<td>$6,572,939</td>
</tr>
<tr>
<td>300</td>
<td>Professional/Technical Services</td>
<td>$1,060,408</td>
<td>$129,937</td>
<td>$930,471</td>
</tr>
<tr>
<td>400</td>
<td>Property Services</td>
<td>$1,468,919</td>
<td>$402,926</td>
<td>$1,065,993</td>
</tr>
<tr>
<td>500</td>
<td>Other Services</td>
<td>$4,208,192</td>
<td>$833,378</td>
<td>$3,374,814</td>
</tr>
<tr>
<td>600</td>
<td>Supplies/Books</td>
<td>$1,419,255</td>
<td>$767,199</td>
<td>$652,056</td>
</tr>
<tr>
<td>700</td>
<td>Equipment/Property</td>
<td>$111,475</td>
<td>$14,375</td>
<td>$97,100</td>
</tr>
<tr>
<td>800</td>
<td>Other Objects</td>
<td>$1,441,760</td>
<td>$667,703</td>
<td>$774,057</td>
</tr>
<tr>
<td>900</td>
<td>Other Financial Uses</td>
<td>$3,703,500</td>
<td>$2,955,000</td>
<td>$748,500</td>
</tr>
<tr>
<td></td>
<td>Total Expenditures</td>
<td>$35,935,896</td>
<td>$8,700,744</td>
<td>$27,235,152</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Expenditures exceeding Revenues</td>
<td>(471,229)</td>
<td>$15,121,173</td>
<td>$15,592,402</td>
</tr>
</tbody>
</table>
IV. CASH, CASH EQUIVALENTS AND RELATED INTEREST INCOME AS OF SEPTEMBER 30, 2013

<table>
<thead>
<tr>
<th></th>
<th>8/31/2013</th>
<th></th>
<th></th>
<th>9/30/2013</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>ENDING</td>
<td>DEBIT</td>
<td>CREDIT</td>
<td>INTEREST</td>
<td>ENDING</td>
</tr>
<tr>
<td></td>
<td>BALANCE</td>
<td>RECEIVED</td>
<td>DISBURSED</td>
<td>INCOME</td>
<td>BALANCE</td>
</tr>
<tr>
<td>GENERAL FUND</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PNC BANK</td>
<td>$ 5,846,653</td>
<td>$ 10,361,670</td>
<td>$(2,444,427)</td>
<td>$ 2,186</td>
<td>$ 13,966,082</td>
</tr>
<tr>
<td>PLGIT</td>
<td>$ 8,180,867</td>
<td>$ 430,963</td>
<td>$ -</td>
<td>$ 111</td>
<td>$ 8,611,941</td>
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<tr>
<td>PSDLAF -interest paid quarterly</td>
<td>$ 153,700</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>$ 153,700</td>
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<tr>
<td>INVEST PROGRAM</td>
<td>$ 170,642</td>
<td>$ -</td>
<td>$ 8</td>
<td></td>
<td>$ 170,650</td>
</tr>
<tr>
<td></td>
<td>$ 14,351,861</td>
<td>$ 10,792,634</td>
<td>$(2,444,427)</td>
<td>$ 2,305</td>
<td>$ 22,902,373</td>
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<tr>
<td>CAFETERIA FUND</td>
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<td></td>
</tr>
<tr>
<td>PNC BANK</td>
<td>$ 33,450</td>
<td>$ 88,561</td>
<td>$(49,473)</td>
<td></td>
<td>$ 72,538</td>
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<tr>
<td>PLGIT</td>
<td>$ 277,965</td>
<td>$ -</td>
<td>$(40,000)</td>
<td>$ 3</td>
<td>$ 310,506</td>
</tr>
<tr>
<td></td>
<td>$ 311,415</td>
<td>$ 88,561</td>
<td>$(89,473)</td>
<td>$ 3</td>
<td>$ 310,506</td>
</tr>
<tr>
<td>CONSTRUCTION FUND / CAP RESERVE</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>PNC BANK</td>
<td>$ 224,323</td>
<td>$ -</td>
<td>$ -</td>
<td>$ 10</td>
<td>$ 224,333</td>
</tr>
<tr>
<td>GRAND TOTAL</td>
<td>$ 14,887,600</td>
<td>$ 10,881,195</td>
<td>$(2,333,900)</td>
<td>$ 2,318</td>
<td>$ 23,437,212</td>
</tr>
</tbody>
</table>

V. SUMMARY OF STUDENT ACTIVITIES ACCOUNTS AS OF SEPTEMBER 30, 2013

<table>
<thead>
<tr>
<th>Bank Account - Status</th>
<th>Middle / High School</th>
<th>Athletics</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash Balance as of August 31, 2013</td>
<td>$ 132,981.46</td>
<td>$ 57,855.06</td>
</tr>
<tr>
<td>Deposits (General Fund Transfer)</td>
<td>$ 1,841.23</td>
<td>$ 11,500.00</td>
</tr>
<tr>
<td>Subtotal</td>
<td>$ 134,822.69</td>
<td>$ 69,355.06</td>
</tr>
<tr>
<td>Expenditures</td>
<td>$ 11,778.60</td>
<td>$ 8,599.28</td>
</tr>
<tr>
<td>Cash Balance as of September 30, 2013</td>
<td>$ 123,044.09</td>
<td>$ 60,755.78</td>
</tr>
</tbody>
</table>
Mr. Thomas Nee

BOARD ACTION REQUESTED

I. OVERNIGHT TRIP / COMPETITION

The Administration recommends the approval of the following overnight trip:

**Keystone Oaks High School Softball Team**
Cookeville, Tennessee
Wednesday-Saturday – March 26, 27, 28, 29, 2014
Coaches – Mark Kaminski, Ron McMillen, Ashley Lowery
Approximate number of students participating – 20-25
Approximate cost per student – $600.00 paid through Fund Raisers and Student Payments
No District funds requested
BOARD ACTION REQUESTED

I. OVERNIGHT TRIPS / COMPETITIONS

Forensics – Erie, PA
M & M Speech & Debate Tournament (McDowell High School)
Friday-Saturday – November 1-2, 2013
Sponsor – Cindy Mentzer
Chaperones – Diane Flaherty
Approximate number of students participating: 8
Approximate cost per student - $140.87
Funds from Activity Account

Golden Eagle Marching Band Spring Trip – Washington, DC
Thursday-Sunday – April 10 – April 13, 2014
Sponsor – William Eibeck
Chaperones – Kathy Enright, Sean Henke, Christie Hay, Karen Wong, Diane Flaherty, Dena Yamalis, Jan Palashoff
Approximate number of students participating – 60 – 65
Approximate cost per student - $650.00
Total cost to the District - $170.00 (Cost of one (1) substitute teacher for two (2) days)

Grade 6 – Cleveland, OH and Erie, PA
Saturday-Sunday, April 12-13, 2014
Sponsors – Lisa McMahon, Amy Torcaso, Nicole Varrenti-Redlinger
Chaperones – Parents’ names to be provided closer to trip time
Approximate number of students participating: 70 – 95
Approximate cost per student - $300.00
No District funds requested

Grade 7 – Washington, DC
Saturday-Sunday, November 23-24, 2013
Sponsors – Lisa McMahon, Amy Torcaso, Nicole Varrenti-Redlinger
Chaperones – Parents’ names to be provided closer to trip time
Approximate number of students participating: 70 - 95
Approximate cost per student - $300.00
No District funds requested
Grade 8 – Gettysburg and Hershey, PA
Saturday-Sunday, May 31 – June 1, 2014
Sponsors – Lisa McMahon, Amy Torcaso, Nicole Varrenti-Redlinger
Chaperones – None
Approximate number of students participating: 70 – 95
Approximate cost per student - $300.00
No District funds requested

Spanish Club – New York City
Friday-Sunday, December 6-8, 2013
Sponsor – Dr. Michele Lowers
Chaperone – Beth Smith, Melinda Kaiser
Approximate number of students participating: 30
Approximate cost per student - $275.00
Total cost to the District - $170.00 (Cost of two (2) substitute teachers for one (1) day)