



**KEYSTONE OAKS SCHOOL DISTRICT**  
**1000 Kelton Avenue**  
**Pittsburgh, PA 15216**

**BOARD OF SCHOOL DIRECTORS**

**WORK SESSION**  
**TUESDAY, NOVEMBER 13, 2018**  
**7:00 PM**

**BUSINESS/LEGISLATIVE MEETING**  
**NOVEMBER 20, 2018**  
**7:00 PM**

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

**November 13, 2018 –Work Session**

**7:00 PM Meeting**

- Call to Order – President
- Pledge of Allegiance
- **History Bowl Winners Recognition – Mr. Aaron Colf, Mr. Mark Kopper & Mr. Jeff Sieg**
- Public Comment
- Review of Reports
- Public Comment
- Adjournment

**November 20, 2018 – Business/Legislative**

**7:00 PM Meeting**

- Call to Order – President
- Pledge of Allegiance
- **NMSI Program Student and Teacher Recognition**
- Public Comment
- Approval of Reports
- Public Comment
- Adjournment

# **BOARD PRESIDENT'S REPORT**

**November 20, 2018**

**Mr. Matthew Cesario**

## **BOARD ACTION REQUESTED**

### **I. BOARD MINUTES**

It is recommended that the Board approve the Work Session Minutes of October 9, 2018 and the Business/Legislative Minutes of October 23, 2018.

### **II. INTERIM BOARD SECRETARY**

It is recommended that the Board appoint **Mr. Joseph Kubiak**, Business Manager, as interim Board Secretary with tentative effective dates of December 2018 through March 2019.

## **FOR INFORMATION ONLY**

I. Parkway West Career and Technology Center Report

*Ms. Annie Shaw*

II. SHASDA Report

*Mr. Santo Raso*

III. PSBA/Legislative Report

*Mrs. Theresa Lydon*

IV. News from the Boroughs

**V. EXECUTIVE SESSION**

# **SUPERINTENDENT'S REPORT**

**November 20, 2018**

**Dr. William P. Stropkaj**

## **BOARD ACTION REQUESTED**

### **I. MEDICAL RESCUE TEAM SOUTH AUTHORITY (MRTSA) MEMBERSHIP**

The Administration recommends that the Board approve the continued membership with the Medical Rescue South Authority at a rate of \$1,885.00, effective January 1, 2019 through December 31, 2019.

### **II. INTERIM MENTAL HEALTH THERAPIST CONTRACT**

It is recommended that the Board approve the interim mental health therapists' contract for **Ms. Lauren Hartz**, effective November 5, 2018.

### **III. SECOND READING POLICY 256: ANTI-BULLYING**

It is recommended that the Board approve the SECOND READING of Policy 256: *Anti-Bullying*.

### **IV. SECOND READING POLICY 609: INVESTMENT OF DISTRICT FUNDS**

It is recommended that the Board approve the SECOND READING of Policy 609: *Investment of District Funds*.

### **V. FIRST READING POLICY 209.2: DIABETES MANAGEMENT**

It is recommended that the Board approve the FIRST READING of Policy 209.2: *Diabetes Management*.

### **VI. FIRST READING POLICY 210.1: POSSESSION/ADMINISTRATION OF ASTHMA INHALERS/EPINEPHERINE AUTO-INJECTORS**

It is recommended that the Board approve the FIRST READING of Policy 210.1: *Possession/Administration of Asthma Inhalers/Epinephrine Auto-Injectors*.

### **VII. FIRST READING POLICY 919: TITLE I PARENT AND FAMILY ENGAGEMENT**

It is recommended that the Board approve the FIRST READING of Policy 919: *Title I Parent and Family Engagement*.

## VIII. REMOVAL OF POLICIES

It is recommended that the Board approve the removal of the following policies:

Policy 263: *Parent Involvement at Dances/Socials*

Policy 309: *Assignment and Transfer*

Policy 310: *Abolishing a Position*

Policy 311: *Reduction in Staff and Furloughs*

Policy 409: *Assignment and Transfer*

Policy 410: *Abolishing a Position*

Policy 411: *Suspension and Furloughs*

Policy 509: *Assignment and Transfer*

Policy 511: *Suspension and Furloughs*

## IX. PROFESSIONAL DEVELOPMENT

It is recommended that the Board approve the following Professional Development request:

|                             |  |            |
|-----------------------------|--|------------|
| <b>Dr. William Stropkaj</b> | PASA Leadership Forum<br>Hilton Hotel Harrisburg<br>Harrisburg, PA<br>March 17 – 18, 2019                        | \$1,150.00 |
| <b>Mr. John Lyon</b>        | Building Operating Management's NFMT 2019<br>Baltimore Convention Center<br>Baltimore, MD<br>March 25 – 27, 2019 | \$1,220.00 |
| <b>Mr. William Eibeck</b>   | The Midwest Clinic<br>Chicago, Illinois<br>December 18 – 22, 2018  | \$2,500.00 |
| <b>Mr. Kevin Gallagher</b>  | Computer Science Education Week Kick-Off<br>Sponsored by Code.org<br>Seattle, Washington<br>December 3 – 4, 2018 | \$619.00   |

# PERSONNEL REPORT

November 20, 2018

Mr. Matthew Cesario, Chairperson  
Ms. Patricia A. Shaw, Co-Chairperson

## BOARD ACTION REQUESTED

### I. RESIGNATIONS

It is recommended that the Board accept the following resignations:

| <u>Name</u>     | <u>Position</u>                 | <u>Effective Date</u> |
|-----------------|---------------------------------|-----------------------|
| Erica Massey    | Food Service Worker             | November 9, 2018      |
| Abigail Ubinger | K-5 Life Skills Support Teacher | December 21, 2018     |

### II. APPOINTMENTS

#### 1. Classified Employees – Paraprofessional

In compliance with the *Keystone Oaks Educational Support Personnel Associate/PSEA/NEA 2014-2017*, the Administration recommends the employment of the following individuals:

##### **Brittany RoBear**

Paraprofessional – Dormont Elementary  
Effective – To be determined (waiting on paperwork)  
Salary - \$12.22 per hour

##### **Zachary Niznik**

Paraprofessional – Personal Care Assistant - Myrtle Avenue Elementary  
Effective – November 9, 2018  
Salary - \$12.72 per hour

#### 2. Food Service Personnel

It is recommended that the Board approve, **Alyssa Sabo**, as a Food Service Worker Middle School/High School at a rate of \$10.00/hour, effective October 24, 2018.

#### 3. Substitute Custodian

It is recommended that the Board approve **Cristian Baang**, Substitute Custodian at a rate of \$10.50 per hour, effective November 5, 2018.

**4. Approval of Athletic Positions and Stipends**

In compliance with the *Keystone Oaks Education Association Collective Bargaining Agreement 2017-2020*, it is recommended that the Board approve the following individual for the 2018/2019 school year retroactive to October 24, 2018:

| <u>Sport</u>       | <u>Position</u> | <u>Coach</u>    | <u>Stipend</u> |
|--------------------|-----------------|-----------------|----------------|
| Basketball (Girls) | Assistant       | Richard Barrett | \$4,300.00     |

**5. Cyber School Program - Correction**

In compliance with the *Keystone Oaks Education Association Collective Bargaining Agreement 2017-2020*, it is recommended that the Board approve the following individual as a Cyber School teacher for the 2018/2019 school year:

**Ken Hustava**                      Physical Education/Health

For Information Only

The above motion was approved at the Business/Legislative meeting on October 23, 2018 however the individual listed for Physical Education was listed incorrectly as Matthew Paradise.

**6. Cyber School Program**

In compliance with the *Keystone Oaks Education Association Collective Bargaining Agreement 2017-2020*, it is recommended that the Board approve the following individual as a Cyber School teacher for the 2018/2019 school year:

**Mark Elphinstone**                      Special Education

**7. Keystone Oaks Recreational Swim Program Staff**

It is recommended that the Board approve the following individual for the Keystone Oaks Recreational Swim Staff at the rates listed below for the 2018/2019 school year:

Instructor (I), Supervisor (S), Guard (G)

Claudia Erb                      (G)

**Pay Rates**

|  |              |
|--|--------------|
| Water Aerobics Instructors             | \$20.00/hour |
| Adult Supervising Instructors          | \$14.00/hour |
| Instructors with Water Safety Training | \$10.00/hour |
| Student Instructors without Water      | \$7.25/hour  |

|                          |              |
|--------------------------|--------------|
| Safety Instruction       |              |
| Adult Program Supervisor | \$10.00/hour |
| Lifeguards               | \$7.25/hour  |

**8. Approval of Activities – Sponsors and Stipends**

In compliance with the *Keystone Oaks Education Association Collective Bargaining Agreement 2017-2020*, it is recommended that the following individuals be approved as sponsors for the 2018/2019 school year:

| <u>Employee</u>       | <u>Position</u>  | <u>Compensation</u> |
|-----------------------|--|---------------------|
| <b>William Eibeck</b> | Musical Assistant (Musical Director/<br>Orchestra Conductor) | \$5,000.00          |
| <b>Amanda Hallam</b>  | Musical Assistant (Costume Designer)                         | \$2,000.00          |
| <b>Shane Hallam</b>   | Musical Director (High School)                               | \$3,000.00          |
| <b>Shane Hallam</b>   | Musical Assistant (Producer/Technical Director)              | \$1,500.00          |
| <b>Alivia Owen</b>    | Musical Assistant (Choreographer)                            | \$3,800.00          |
| <b>Craig Wetzel</b>   | Musical Assistant (Set Design)                               | \$2,000.00          |

**III. POST SEASON COACHING STIPENDS**

In compliance with the *Keystone Oaks Education Association Collective Bargaining Agreement 2017-2020*, it is recommended that the Board approve payment of \$50.00 per week to the following individuals for coaching in the post season:

| <u>Sport</u>     | <u>Coach</u>     | <u>Stipend</u>     |
|------------------|------------------|--------------------|
| Boys Soccer      | Andy Hornak      | \$100.00 (2 weeks) |
|                  | John McCarthy    | \$100.00 (2 weeks) |
|                  | Sotiri Tsourekxi | \$100.00 (2 weeks) |
| Cross Country    | Judith Fritz     | \$100.00 (2 weeks) |
|                  | Sarah Hardner    | \$100.00 (2 weeks) |
|                  | Lainey Resetar   | \$100.00 (2 weeks) |
| Girls Volleyball | Dave Harouse     | \$50.00 (1 week)   |
|                  | Mike O’Leary     | \$50.00 (1 week)   |
| Golf             | Dennis Sarchet   | \$50.00 (1 week)   |
|                  | Josh Short       | \$50.00 (1 week)   |

**IV. TENURE**

It is recommended that the Board recognize, **Heather Hardy**, as having completed the requirements according to the Commonwealth of Pennsylvania and achieving tenure on November 3, 2018 with a Professional Contract.



## **V. LEAVE OF ABSENCE**

It is recommended that the Board approve the following individuals for Family and Medical Leave:

J.G. – Effective October 8, 2018

J.N. – Tentative December 17, 2018 through March 21, 2019

## **VI. UNPAID LEAVE OF ABSENCE**

It is recommended that the Board approve the following individual for an Unpaid Leave of Absence:

L.S. – Effective December 20, 2018 through January 18, 2019.

# FINANCE REPORT

November 20, 2018

Mrs. Theresa Lydon, Chairperson

## **BOARD ACTION REQUESTED**

### **I. ACCOUNTS PAYABLE APPROVAL LISTS THROUGH OCTOBER 31, 2018**

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

|   |                       |
|---|-----------------------|
| A. General Fund as of October 31, 2018 (Check No. 58045-58284)  | \$1,139,450.02        |
| B. Risk Management as of October 31, 2018 (None)                | \$0.00                |
| C. Food Service Fund as of October 31, 2018 (None)              | \$0.00                |
| D. Athletics as of October 31, 2018 (Check No. 2060-2071)       | \$2,808.93            |
| E. Capital Reserve as of October 31, 2018 (Check No. 1611-1612) | \$14,990.70           |
| F. Compensated Absences Fund as of October 31, 2018 (None)      | \$0.00                |
| G. OPEB Fund as of October 31, 2018 (None)                      | \$0.00                |
| <b>TOTAL</b>  | <b>\$1,157,249.65</b> |

### **II. ACA TAXTRACK SOFTWARE LICENSE AGREEMENT**

The Administration recommends that the Board approve the ACA TaxTrack Software License Agreement between AMCA Systems, LLC and the Keystone Oaks School District for the tax year 2018 at a cost of \$2,450.00.

#### **For Information Only**

The license fee will cover filing requirements for the 2018 tax year. The cost for the Software License is an increase in \$55.00 from the previous year.

**FOR INFORMATION ONLY**

**I. EXPENDITURE/REVENUE 2018 – 2019 BUDGET to ACTUAL / PROJECTION**

| ACCT                                       | DESCRIPTION                        | 2018-2019<br>BUDGET<br>TOTAL | 2018-2019<br>4 MONTH<br>OCTOBER/ACTUAL | OVER<br>(UNDER)<br>BUDGET |
|--|------------------------------------|------------------------------|--|---------------------------|
| <b>Revenue</b>                             |                                    |                              |  |                           |
| 6000                                       | Local Revenue Sources              | \$ 30,014,864                | \$ 25,085,178                          | \$ (4,929,686)            |
| 7000                                       | State Revenue Sources              | \$ 12,065,343                | \$ 2,895,802                           | \$ (9,169,541)            |
| 8000                                       | Federal Revenue Sources            | \$ 849,422                   | \$ 150,069                             | \$ (699,353)              |
| <b>Total Revenue</b>                       |                                    | <b>\$ 42,929,629</b>         | <b>\$ 28,131,049</b>                   | <b>\$ (14,798,580)</b>    |
| <b>Expenditures</b>                        |                                    |                              |  |                           |
| 100  | Salaries                           | \$ 16,783,162                | \$ 3,195,976                           | \$ 13,587,186             |
| 200  | Benefits                           | \$ 10,702,403                | \$ 2,347,122                           | \$ 8,355,281              |
| 300  | Professional/Technical<br>Services | \$ 1,574,811                 | \$ 309,793                             | \$ 1,265,018              |
| 400  | Property Services                  | \$ 1,079,511                 | \$ 375,309                             | \$ 704,202                |
| 500  | Other Services                     | \$ 5,225,206                 | \$ 1,589,849                           | \$ 3,635,357              |
| 600  | Supplies/Books                     | \$ 1,417,523                 | \$ 907,348                             | \$ 510,175                |
| 700  | Equipment/Property                 | \$ 530,282                   | \$ 310,895                             | \$ 219,387                |
| 800  | Other Objects                      | \$ 641,126                   | \$ 325,118                             | \$ 316,008                |
| 900  | Other Financial Uses               | \$ 4,975,605                 | \$ 3,706,730                           | \$ 1,268,875              |
| <b>Total Expenditures</b>                  |                                    | <b>\$ 42,929,629</b>         | <b>\$ 13,068,140</b>                   | <b>\$ 29,861,489</b>      |
| <b>Revenues exceeding<br/>Expenditures</b> |                                    | <b>\$ -</b>                  | <b>\$ 15,062,909</b>                   | <b>\$ 15,062,909</b>      |
| <b>Other Financing<br/>Sources/(Uses)</b>  |                                    |                              |  |                           |
| Interfund Transfers In (Out)               |                                    | \$ -                         | \$ -                                   | \$ -                      |

**II. SUMMARY OF STUDENT ACTIVITIES ACCOUNTS AS OF OCTOBER 31, 2018**

| <b>Bank Account - Status</b> | <b>Middle / High School</b> | <b>Athletics</b> |
|------------------------------|-----------------------------|------------------|
| Cash Balance - 10/1/2018     | \$ 84,630.26                | \$ 75,166.59     |
| Deposits                     | \$ 15,663.38                | \$ 22,253.99     |
| Subtotal                     | \$ 100,293.64               | \$ 97,420.58     |
| Expenditures                 | \$ 19,634.02                | \$ 5,402.98      |
| Cash Balance - 10/31/2018    | \$ 80,659.62                | \$ 92,017.60     |

**III. BANK BALANCES**

**BANK BALANCES PER STATEMENT AS OF OCTOBER 31, 2018**

|  | <b>BALANCE</b> |                   |
|--|----------------|-------------------|
| <b>GENERAL FUND</b>                        |                |                   |
| FNB BANK                                   | \$             | 1,945,879         |
| PAYROLL (pass-thru account)                | \$             | 6,935             |
| FNB SWEEP ACCOUNT                          | \$             | 21,345            |
| ATHLETIC ACCOUNT                           | \$             | 92,018            |
| PLGIT                                      | \$             | 9,254,460         |
| FNB Money Market                           | \$             | 7,318,278         |
| PSDLAF                                     | \$             | 158,087           |
| INVEST PROGRAM                             | \$             | 175,432           |
|  | <b>\$</b>      | <b>18,972,434</b> |
| <br>                                       |                |                   |
| <b>CAFETERIA FUND</b>                      |                |                   |
| FNB BANK                                   | \$             | 180,502           |
| PLGIT                                      | \$             | 104,083           |
|  | <b>\$</b>      | <b>284,585</b>    |
| <br>                                       |                |                   |
| <b>CONSTRUCTION FUND / CAP RESERVE</b>     |                |                   |
| FNB BANK                                   | \$             | 707,159           |
| PLGIT - G.O. BOND SERIES C OF 2014/ 12-18  | \$             | 777               |
|  | <b>\$</b>      | <b>707,936</b>    |
| <br>                                       |                |                   |
| <b>RISK MANAGEMENT / TAX REFUNDS</b>       |                |                   |
| FNB BANK                                   | <b>\$</b>      | <b>498,161</b>    |
| <br>                                       |                |                   |
| <b>OTHER POST-EMPLOYMENT BENEFITS FUND</b> |                |                   |
| FNB BANK                                   | <b>\$</b>      | <b>1,921,238</b>  |
| <br>                                       |                |                   |
| <b>COMPENSATED ABSENCES FUND</b>           |                |                   |
| FNB BANK                                   | <b>\$</b>      | <b>416,429</b>    |
| <br>                                       |                |                   |
| <b>GRAND TOTAL</b>                         | <b>\$</b>      | <b>22,800,783</b> |

# Policy Guide



Policy No. 256

Section PUPILS

Title ANTI-BULLYING

Adopted NOVEMBER 15, 2007

Revised DECEMBER 15, 2015;  
DECEMBER 6, 2012

| <b>POLICY NO. 256<br/>ANTI-BULLYING</b> |  |
|---|--|
| <b>Section 1</b>                        | <p><b><u>Purpose</u></b></p> <p>The Keystone Oaks School District recognizes that a student's ability to learn, and the District's ability to safely educate its students, is adversely affected by bullying. The School District seeks to avoid these adverse effects, maintain the safety of the school environment and provide opportunities to rehabilitate a student who has engaged in bullying.</p>   |
| <b>Section 2</b>                        | <p><b><u>Definitions</u></b></p> <p><b>Bullying</b> shall be defined as an intentional and unwelcome electronic (cyber), written, verbal, or physical act, or series of acts that has these characteristics:</p> <ol style="list-style-type: none"> <li>1. It is directed at another student or group of students.</li> <li>2. It is severe, persistent or pervasive.</li> <li>3. It has the effect of:                             <ol style="list-style-type: none"> <li>a. Substantially interfering with a student's education.</li> <li>b. Substantially disrupting the orderly operation of the school.</li> <li>c. Creating a threatening environment.</li> </ol> </li> </ol> |

SC 1303.1

**POLICY NO. 256  
ANTI-BULLYING**

4. Occurs in a “school setting:” “School setting” shall mean in the school, on school grounds, in school vehicles, on contracted school vehicles, at a designated bus stop, or during any activity sponsored, supervised, or sanctioned by the school and/or District.

The District reserves the right to investigate acts of bullying that occur outside the school setting if those acts meet the requirements of number 3 (above).

Examples of bullying include, but are not limited to physically, emotionally or mentally harming a student; damaging, extorting or taking a student’s property; placing a student in reasonable fear of physical, emotional or mental harm; placing a student in reasonable fear of damage to or loss of personal property; creating an intimidating or hostile environment that substantially interferes with a student’s education opportunities; or perpetuation of conduct by an individual or group, with the intent to demean, and/or dehumanize a student.

**Cyber harassment of a child** is a form of bullying. A person commits the crime of cyber harassment of a child if, with intent to harass, annoy or alarm, the person engages in a continuing course of conduct of making any of the following by electronic means directly to a child or by publication through an electronic social media service:

1. Seriously disparaging statement or opinion about the child’s physical characteristics, sexuality, sexual activity or mental or physical health or condition.
2. Threat to inflict harm.

The law makes cyber harassment of a child a third-degree misdemeanor, punishable by a maximum of \$2,500 fine and/or one year in prison. For a juvenile charged with the crime, a diversionary program, which might include an educational program on cyber harassment, would be considered first. Successful completion could lead to the juvenile’s record being expunged.

SC 1303.1

Title 18 Sec. 2709

Title 18 Sec. 2709

|                         |   |   |
|-------------------------|---|---|
| <p><b>Section 3</b></p> | <p style="text-align: center;"><b>POLICY NO. 256<br/>ANTI-BULLYING</b></p> <p><b>Course of Conduct</b> – A pattern of action composed of more than one act over a period of time, however short evidencing a continuity of conduct. The term includes lewd, lascivious, threatening or obscene words, language, drawing, caricatures or actions, either in person or anonymously.</p> <p><b>Emotional distress</b> – A temporary or permanent state of mental anguish.</p> <p><b>Seriously disparaging statement or opinion</b> – A statement or opinion which is intended to and under the circumstances is reasonably likely to cause substantial emotional distress to a child of the victim’s age and which produces some physical manifestation of the distress.</p>   | <p>Title 18 Sec. 2709</p> <p>Title 18 Sec. 2709</p> <p>Title 18 Sec. 2709</p> |
|                         | <p><b><u>Delegation of Responsibility</u></b></p> <p>Every student and employee shall take the responsibility of respecting the rights of others and creating a safe, caring, positive climate throughout the District.</p> <p>The Superintendent or designee shall develop administrative regulations to implement this policy. In addition, the Administration will develop procedures for training all employees, including chaperones and sponsors on the Policy.</p> <p>The Superintendent or designee shall ensure that this policy and administrative regulations are reviewed annually with students.</p> <p>The Superintendent or designee, in cooperation with other appropriate administrators, shall review this policy every three (3) years at a minimum and recommend necessary revisions to the Board.</p> <p>District administration shall annually provide the following information with the Safe School Report:</p> <ol style="list-style-type: none"> <li>1. Board’s Bullying Policy</li> <li>2. Report of bullying incidents</li> </ol> |   |

**POLICY NO. 256  
ANTI-BULLYING**

3. Information on the development and implementation of any bullying prevention, intervention or education programs.

The Administration is directed to evaluate the need, if any, for District-wide or building-level evidence-based bullying prevention programs, and to report its findings to the Board of School Directors with appropriate recommendations.

The Administration is directed to continue to assess, and to make recommendations to the Board of School Directors, for any appropriate changes to existing intervention programs and practices in place to address the needs of students who are bullied, and the issues relating to students who engage in bullying.

**Section 3**

**General Guidelines**

It shall be a violation of District Policy for any student or adult to engage in, encourage and/or condone, or communicate, any form of bullying. It shall also be a violation of Policy for any employee, approved volunteer or chaperone of the School District to encourage and/or condone, through action or lack of action, any form of bullying. This prohibition shall apply to all acts of bullying that occur on school district property, at school district functions (whether on school property or not), and/or on school district provided transportation. In addition, cyber harassment is a criminal offense under PA Act 26 of 2015 and may be deemed to have been committed at the place where the child who is the subject of the communication resides.

School District employees are required to report alleged violations of this Policy to the Building Principal or the Superintendent in accordance with the procedures set forth herein.

**Section-4**

**Dissemination of Policy**

This Anti-bullying Policy will be disseminated annually to all school staff, students, and parents. It will be distributed each year to all students with a copy of the [Code of Student](#)

Pol. 103, 104~~848~~



**POLICY NO. 256  
ANTI-BULLYING**

Conduct ~~Student Handbook~~, or will be incorporated into the Handbook. Building administrators will develop a procedure for discussing the Policy with students in individual buildings. The Policy will also be posted on the District web page and published at a minimum of once each year in a District publication and be made available in every classroom. Information on the Anti-bullying Policy will also be incorporated in training programs for all new school employees, as well as being referenced in the staff handbooks.

**Section-5**

General Procedures Relating to Complaint

Each student shall be advised that the fact that he/she alleges bullying by another student or who reports an incident of bullying will not reflect upon the student's status. Any retaliation based upon a student's good faith initiation of a complaint, participation in the investigation of a complaint, or provision of information relating to a bullying complaint is prohibited and will result in disciplinary action. If any student believes he or she is being retaliated against for filing a complaint under this policy, or the student's parent believes that his/her child is being retaliated against for filing a complaint under this policy, he or she shall report the retaliations in the same manner as indicated below.

The Principal of the building to which the alleged victim is assigned will investigate all complaints, PROVIDED HOWEVER, that if the complaint alleges that the perpetrator of the bullying is an Administrator or Supervisor employed by the School District and it is alleged that the Administrator or Supervisor encouraged, condoned, or turned a blind eye to the bullying of the alleged student-victim, the Superintendent or his designee shall investigate the complaint.

**Section-6**

Investigation Procedure

1. Separate interviews of the Complainant and the alleged perpetrator will be conducted and all information will be documented in written form on Form A. Each of the involved individuals will be asked to sign an Acknowledgment of the statements provided during the interview. At the time of the interview, a copy of this

**POLICY NO. 256  
ANTI-BULLYING**

Policy will be provided to the individuals involved and the Policy and complaint procedure will be reviewed with each individual.

2. During the interviews each individual will be given the opportunity to state his/her side of the incident, to identify any witnesses to corroborate his/her statements, and to provide input as to the possible resolution of the situation. Each student may have his or her parent or guardian present during the interview and parental involvement in this process will be encouraged.

If the Building Principal/Superintendent determines that measures are required during the period of investigation to alleviate the potential bullying, such a separation of the alleged victim and the alleged perpetrator or close monitoring of the alleged perpetrator, such measures shall be taken until the investigation is completed.

3. A fact-finding investigation will be conducted and a written record of the fact-finding investigation including witness interviews, findings of the investigation and recommended action shall be set forth on Form B.
4. The results of the fact-finding investigation, including any recommended action will be shared with the Complainant and with the Accused.
5. If the Building Principal has conducted the investigation, he/she shall report his/her findings to the Superintendent. The Superintendent may consult with the Solicitor or special counsel as appropriate, in instances where disciplinary action is contemplated.
6. If the investigation results in a finding that a student has engaged in bullying in violation of this Policy, the Building Principal shall determine the appropriate discipline to be imposed, which may include, but not be limited to, suspension from school, or a recommendation to the Superintendent that the student be expelled from school following a hearing before the Board. In

Pol. 218

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ANTI-BULLYING**

determining the level of discipline to be imposed, the Building Principal shall consider:

- a. The prior disciplinary record of the student-perpetrator.
- b. The relative ages and maturity levels of the students.
- c. The nature and frequency of the inappropriate conduct by the student-perpetrator toward the student-victim.
- d. The degree of harm experienced by the student-victim.
- e. The extent, if any, to which the student-perpetrator encouraged or involved other students in the bullying of the student-victim.
- f. Any other circumstances or factors deemed relevant on this issue.

References:

School Code – 24 P.S. Sec. 1301.1

Board Policy – 218, 848

Title 18 (Crimes and Offenses) – Sec. 2709

# Policy Guide



Policy No. 609

Section FINANCES

Title INVESTMENT OF DISTRICT FUNDS

Adopted NOVEMBER 20, 2014

Revised \_\_\_\_\_

|                         |  |  |
|-------------------------|--|--|
| <p><b>Section 1</b></p> | <p style="text-align: center;"><b>POLICY NO. 609<br/>INVESTMENT OF DISTRICT FUNDS</b></p> <p><b><u>Purpose</u></b></p> <p>It shall be the policy of the Board to optimize its return through investment of cash balances in such a way as to minimize non-invested balances and to maximize return on investments with the following principles:-</p> <p><del>The primary objectives of investment activities, in priority order, shall be:</del></p> <p><b>Legality</b> - All investments shall be made in accordance with applicable laws of Pennsylvania.</p> <p><b>Safety</b> - <del>Preservation</del><b>Safety</b> of principal shall be of highest priority. Preservation of <del>principal</del><b>capital</b> in the portfolio of investments shall be ensured by <del>diversification and other means of</del> <b>through the mitigation of</b> minimizing credit risk, market risk and interest rate risk and by thoroughly investigating and reviewing the performance of all investment providers and professionals.</p> <p><b>Liquidity</b> - Investments shall remain sufficiently liquid to meet all operating requirements that are reasonably anticipated. A fiscal year operations anticipated cash flow shall be developed so that investments can be made as early as possible, with maturities concurrent with anticipated cash demands.</p> |  |
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|                         | <p><b>POLICY NO. 609</b><br/> <b>INVESTMENT OF DISTRICT FUNDS</b></p> <p><b>Yield</b> - Investments shall be made with the objective of attaining a market-average rate of return throughout the budgetary and economic cycles, taking into account the investment risk constraints and liquidity needs.</p>   |   |
| <p><b>Section 2</b></p> | <p><b><u>Authority</u></b></p> <p>All investments of the District made by an officer and/or employee of the District shall be made in accordance with this policy, applicable laws, and the a-Board-approved investment program.</p>   | <p>SC 440.1, 621, 622, 623<br/> 53 P.S. 5406, 5410.1</p>  |
| <p><b>Section 3</b></p> | <p><b><u>Definitions</u></b></p> <p><b>Act 10 Permissible Investments</b> – Any type of investment permitted under Act 10 of March 25, 2016, (53 P.S. Sec. 5406, 5410.1) that is not among the types of investments permitted under Section 440.1 of the Public School Code of 1949, Act of March 10, 1949, (P.L. 30, No. 14) as last amended by the Act of June 30, 1995, (P.L. 220, No. 26).</p> <p><b>School Code Permissible Investments</b> – Any investment permitted under Section 440.1 of the Public School Code of 1949, Act of March 10, 1949, (P.L. 30, No. 14) as last amended by the Act of June 30, 1995, (P.L. 220, No. 26).</p> <p><b>Short-term</b> – Any period thirteen (13) months or less.</p> <p><b>Long-term</b> – Any period exceeding forty-eight (48) months duration.</p> <p><b>Mid-range</b> – Any period between short-term and long-term.</p> <p><b>Bankers’ acceptances</b> – Banker’s acceptances generally are created based on a letter of credit issued in a foreign trade transaction. Bankers’ acceptances are short-term, non-interest-bearing notes sold at a discount and redeemed by the accepting banks at maturity for face value.</p> <p><b>Collateral</b> – Security pledged by a financial institution to a</p> | <p>SC 440.1<br/> 53 P.S. 5406, 5410.1</p> <p>SC 440.1</p> |

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governmental entity for its deposit.

**Commercial paper** – An unsecured promissory note issued primarily by corporations for a specific amount and maturing on a specific day. The maximum maturity for commercial paper is 270 days, but most is sold with maturities of up to thirty (30) days. Almost all commercial paper is rated as to credit risk by rating services.

**Concentration of credit risk** – ~~The risk of loss attributed to the magnitude of a government’s associated with the consolidation of investments~~ in a single issuer pool, institution, or instrument.

**Counterparty** – Another party to a transaction. In the case of deposits and investments made by governmental entities, a counterparty could be the issuer of a security, a financial institution holding a deposit, a broker-dealer selling securities, or a third party holding securities or collateral.

**Credit risk** – The risk that a counterparty to an investment transaction will not fulfill its obligations. Overall credit risk can be associated with the issuer of a security, with a financial institution holding deposits, or with a party holding securities or collateral. Credit risk exposure can be affected by a concentration of deposits or investments in any one (1) investment type or with any one (1) counterparty ~~the risk of loss of principal due to the failure of the security issue or backer of the issue.~~

**Custodial credit risk** – The custodial credit risk for *deposits* is the risk that, in the event of the failure of a depository financial institution, a government will not be able to recover deposits or will not be able to recover collateral securities that are in the possession of an outside party. The custodial credit risk for *investments* is the risk that, in the event of the failure of the counterparty to a transaction, a government will not be able to recover the value of investment or collateral securities that are in the possession of an outside party ~~the risk of loss associated with consolidation of investments with a single institution where the District may rely on the institution to hold investments on behalf of the District or through collateral action when the instruments are not in the District name.~~

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**Foreign currency risk** – ~~The risk that changes in exchange rates will adversely affect the fair value of an investment or deposit. Investments depending on substantial overseas activities or markets may present related foreign currency risk associated with investment in foreign currency that is subject to market fluctuation and associated currency conversion.~~

**Interest rate risk** – ~~The risk that changes in interest rates will adversely affect the fair value of an investment the risk that the market value of securities will fall due to changes in general interest rates.~~

**Issuer** – The entity that has the authority to distribute a security or other investment. A bond issuer is the entity that is legally obligated to make principal and interest payments to bond holders. In the case of mutual funds, external investment pools, and other pooled investments, issuer refers to the entity invested in, not the investment company-manager or pool sponsor.

**Investment program** – ~~The specifically enumerated and Board approved investment strategy.~~

**Local Government Investment Pool (LGIP)** – An investment trust or pool organized by groups of political subdivisions or municipal authorities pursuant to Section 521 of the Public School Code of 1949, or pursuant to the Intergovernmental Cooperation Law, 53 Pa. C.S.A. Sec. 2301 et seq., for the purpose of investing funds of such political subdivisions or municipal authorities for their exclusive benefit and in accordance with the laws governing their permissible investments. LGIPs include, but are not limited to, the Pennsylvania School District Liquid Asset Fund (PSDLAF), the Pennsylvania Local Government Investment Trust (PLGIT), and for purposes of this policy, the PA INVEST program operated by the Pennsylvania Treasury Department.

**Market Risk** – The risk that the market value of an investment, collateral protecting a deposit, or securities underlying a repurchase agreement will decline. Market risk is affected by the length to maturity of a security, the need to liquidate a security before maturity, the extent that collateral exceeds the amount invested, and the frequency at which the amount of collateral is

SC 521  
53 Pa. C.S.A. 2301  
et seq.

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adjusted for changing market values.

**Repurchase agreement –**

- a. An agreement in which a governmental entity (buyer-lender) transfers cash to a broker-dealer or financial institution (seller-borrower); the broker-dealer or financial institution transfers securities to the entity and promises to repay the cash plus interest in exchange for the same securities.
- b. A generic term for an agreement in which a governmental entity (buyer-lender) transfers cash to a broker-dealer or financial institution (seller-borrower); the broker-dealer or financial institution transfers securities to the entity and promises to repay the cash plus interest in exchange for the same securities (as in definition (a) above) or for different securities.

**Shares of an investment company –** For purposes of School Code Permissible Investments, shares of an investment company registered under the Investment Company Act of 1940 (54 Stat. 789, 15 U.S.C. Sec. 80a-1 et seq.), and whose shares are registered under the Securities Act of 1933 (48 Stat. 74, 15 U.S.C. Sec. 77a et seq.) and which satisfies the further conditions set forth in Section 440.1 of the School Code, subsection (b), clause (v).

SC 440.1  
15 U.S.C. 77a et seq.  
15 U.S.C. 80a-1 et seq.

**Weighted average maturity –** A weighted average maturity measure expresses investment time horizons—the time when investments become due and payable—in years or months, weighted to reflect the dollar size of individual investments within an investment type.

**Section 4**

**Delegation of Responsibility**

The Board shall delegate to the ~~Business Manager~~ ~~Director of Fiscal Services~~ the responsibility to manage the District's investment program in accordance with written, Board-approved procedures for operation of the investment program.

SC 440.1

An annual review of the investment program shall be prepared



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by the ~~Business Manager~~~~Director of Fiscal Services~~ based upon the anticipated cash flow for ~~of~~ general and segregated/designated ~~all district~~ funds of the District; (i.e. general, capital reserve, bond, etc.), including bond proceeds, taking into account the anticipated liquidity needs of each fund. The investment program shall be submitted to the Board no later than sixty (60) days after adoption of the annual budget.

The plan may provide for moneys from more than one (1) fund under school district control for the purchase of any single investment, provided that each of the funds combined for the purpose shall be accounted for separately in all respects and that the earnings from the investment are separately and individually computed and recorded, and credited to the accounts from which the investment was purchased.

The plan shall not encompass the investment of any student activity or class-related funds separately managed pursuant to School Code Section 511.

The ~~Business Manager~~~~Director of Fiscal Services~~designated ~~individual responsible for investments~~ shall report quarterly to the Board the following:

1. Amount of funds invested.
2. Interest earned and received to date.
3. Types and amounts of each investment and the interest rate on each.
4. Names of the institutions where investments are placed.
- ~~5. Current market value of the funds invested.~~
6. Transactions occurring since the last report.
7. The means by which any deposits exceeding insurance limits are collateralized.
- ~~8~~7. Other information required by the Board.

SC 511  
Pol. 618

SC 440.1  
72 P.S. 3836-1 et  
seq.

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This report may, but is not required to, include the information regarding depository balances, earnings and transactions required by the School Code to be reported to the Board monthly as set forth in Policy 608.

SC 624  
Pol. 608

If there is a major change in the District's investment portfolio, such as a transfer of funds, the Business Manager ~~Director of Fiscal Services~~ will alert the Board at that time and not wait for the quarterly report.

The Board directs the Superintendent or his/her designee to develop written procedures that will ensure compliance with this policy. Such procedures shall include a disclosure form for designated individuals involved in the investment process and/or required written statements for advisors and bidders.

**Section 5**

**Guidelines**

Investments permitted by this policy are those defined in law and enumerated in this policy that are ~~Section 440.1 of the School Code, as amended, which are~~ appropriately collateralized with this policy in accordance with applicable laws.

SC 440.1

School Code Permissible Investments

1. United States Treasury bills.
2. Short-term obligations of the United States Government or its agencies or instrumentalities.
3. Deposits in savings accounts or time deposits or share accounts of institutions insured by the Federal Deposit Insurance Corporation (FDIC) or the Federal Savings and Loan Insurance Corporation (FSLIC) or the National Credit Union Share Insurance Fund (NCUSIF) to the extent that such accounts are so insured, and, for any amounts above the insured maximum, provided that approved collateral as provided by law therefore shall be pledged by the depository.

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4. Obligations of the United States of America or any of its agencies or instrumentalities backed by the full faith and credit of the United States of America, the Commonwealth of Pennsylvania or any of its agencies or instrumentalities backed by the full faith and credit of the Commonwealth, or of any political subdivision of the Commonwealth of Pennsylvania or any of its agencies or instrumentalities backed by the full faith and credit of the political subdivision.
5. Shares of an investment company registered under the Investment Company Act of 1940 (54 Stat. 789, 15 U.S.C. Sec. 80a-1 et seq.), whose shares are registered under the Securities Act of 1933 (48 Stat. 74, 15 U.S.C. Sec. 77a et seq.). Provided, that the following are met:
  - a. The only investments of that company are in the authorized investments for school district funds listed in items 1 through 4 above and repurchase agreements fully collateralized by such investments.
  - b. The investment company is managed so as to maintain its shares at a constant net asset value in accordance with 17 CFR Sec. 270 2a-7 (relating to money market funds).
  - c. The investment company is rated in the highest category by a nationally recognized statistical rating organization.
6. Local Government Investment Pools (LGIPs) as defined in this policy.
7. Repurchase agreements with respect to U.S. Treasury bills or obligations, participations or other instruments of or guaranteed by the U.S. or any federal agency, instrumentality or U.S. government-sponsored.

17 CFR Part 270

Act 10 Permissible Investments

1. Obligations, participations or other instruments of any

~~65 Pa. C.S.A. Sec. 1101 et seq.~~

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federal agency, instrumentality or U.S. government-sponsored enterprise if the debt obligations are rated at least "A" or its equivalent by at least two (2) nationally recognized statistical ratings organizations.

2. Commercial paper issued by corporations or other business entities organized in accordance with federal or state law, with a maturity not to exceed 270 days, if the issuing corporation or business entity is rated in the top short-term category by at least two (2) nationally recognized statistical ratings organizations.
3. Bills of exchange or time drafts drawn on and accepted by a commercial bank, otherwise known as bankers' acceptances, if the bankers' acceptances do not exceed 180 days maturity and the accepting bank is rated in the top short-term category by at least two (2) nationally recognized statistical ratings organizations.
4. Negotiable certificates of deposit or other evidences of deposit, with a remaining maturity of three (3) years or less, issued by a nationally or state-chartered bank, a federal or state savings and loan association or a state-licensed branch of a foreign bank.
  - a. For obligations with a maturity of one (1) year or less, the debt obligations of the issuing institution or its parent must be rated in the top short-term rating category by at least two (2) nationally recognized statistical ratings organizations.
  - b. For obligations with a maturity in excess of one (1) year, the senior debt obligations of the issuing institution or its parent must be rated at least "A" or its equivalent by at least two (2) nationally recognized statistical ratings organizations.
5. Shares of an investment company registered under the Investment Company Act of 1940 (54 Stat. 789, 15 U.S.C. Sec. 80a-1et seq.) whose shares are registered under the Securities Act of 1933 (48 Stat. 74, 15 U.S.C. Sec. 77a et seq.), if all of the following conditions are

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met:

- a. The investments of the company are the authorized investments under 53 P.S. §5410.1, subsection (a) (Act 10, Section 1.1(a)).
- b. The investment company is managed in accordance with 17 CFR Sec. 270.2a-7 (relating to money market funds).
- c. The investment company is rated in the highest category by a nationally recognized rating agency.

Management of Investment and Collateral

All securities or other investments in which the school district invests or that collateralize school district investments shall be managed as provided in this policy and in the school district's investment plan annually approved by the Board.

The plan shall require that securities purchased as investments be purchased in the name of the school district and held in custody for the benefit of the school district as provided in the investment plan and authorized custodian agreements. The plan may make exceptions to such requirements for investments in LGIPs as defined in this policy, or for the purchase of shares of an investment company as defined in this policy.

If, after purchase, the rating of any instrument is reduced and no longer in compliance with Board policy, the individual responsible for district investments shall advise the Board at the earliest opportunity of such action and make recommendations for altering investments.

The foregoing rating change related requirement(s) do(es) not apply to investments in LGIPs as defined in this policy.

For purposes of interest rate disclosure in the annual financial report, the method of determining interest rate risk shall be based on weighted average maturity.

SC 440.1

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Foreign Currency and Related Risk

District funds shall not be invested in foreign currency. To the extent other permissible investments are exposed to related foreign currency risk; they shall ~~and shall not have any related risk that would require~~ be disclosed as required by ~~pursuant to~~ GASB Statement 40.

Bond Proceeds

~~Bond proceeds shall be~~ investment of bond proceeds shall be managed and reported to the Board ~~ed~~ in accordance with the Local Government Unit Debt Act, this policy, and applicable federal and state laws, ~~subject to approval by the solicitor and/or bond counsel and the School Board.~~

Protection of Savings Accounts, Time Deposits, Share Accounts or Other Depository Balances in Excess of FDIC Insurance Limits

When district cash is deposited in any savings account, time deposit, share account or other authorized depository account other than a Local Government Investment Pool (LGIP), if the cash balance exceeds FDIC insurance limits, district funds shall be collateralized in one or more of the following ways:

1. An Irrevocable Letter of Credit (LOC) issued by a Federal Home Loan Bank (FHLB).
2. Tri-Party Collateral in the name of the school district consisting of the following underlying securities only:
  - a. U.S. Treasury Securities.
  - b. Obligations, participations or other instruments of any federal agency, instrumentality or U.S. government-sponsored enterprise if the debt obligations are rated at least "A" or its equivalent by at least two (2) nationally recognized statistical ratings organizations.

53 Pa. C.S.A. Sec. 8001 *et seq.*, 8224

SC 440.1  
72 P.S. 3836-1 *et seq.*

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3. Assets pledged as collateral in accordance with the act of August 6, 1971, (P.L. 281, No.72), 72 P.S. Sec. 3836-1 et seq. (relating to pledges of assets to secure deposits of public funds, whether or not pooled).

72 P.S. 3836-1 et seq.

It shall be the responsibility of the Business Manager ~~Director of Fiscal Services~~ to verify with the depository the value of the collateral instrument(s) based on the instrument being “marked to market.” This valuation shall occur at least monthly.

Following a review of valuation, the Business Manager ~~Director of Fiscal Services~~ may request an additional review by the district’s investment advisors or financial consultant, and shall require additional collateral if the existing collateral has declined in value and exposes the district to potential loss of principal. The status of the valuation review and any additional collateral shall be included in the periodic reports to the Board regarding the investment program.

Reporting Requirement for Local Government Investment Pools (LGIPs)

Local Government Investment Pools (LGIPs) pool the resources of participating government entities and invest in various securities as permitted under state law, so that participating governments can benefit from economies of scale, professional fund management and other advantages.

Recognizing that LGIPs invest directly in permissible securities on behalf of the participating government entities, which in turn have proportional ownership rights in those securities, district investments in a LGIP shall not be subject to the collateral requirements of this policy, provided that the LGIP:

1. Makes available to participants daily and monthly statements, and other information from which the status of the investments can be verified.
2. Provides an audited annual financial report to each participating government entity.

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Further Risk Mitigation for Act 10 Permissible Investments

Recognizing that Act 10 of 2016 expanded the range of permissible investments to include investments with the potential to expose the school district to elevated levels of credit risk and other investment risks, the Board directs that any investment plan or investment recommendations proposed by the Investment Officer take into account, implement and highlight the following factors and precautions with respect to Act 10 Permissible Investments:

1. It cannot be assumed that negotiable certificates of deposit are collateralized.
2. A significantly more thorough level of due diligence is required.
3. Any investment in the fourth category of Act 10 Permissible Investments listed above (negotiable certificates of deposit or other evidences of deposit) must have a maturity not exceeding one (1) year in duration.
4. In addition to verification of rating by a nationally recognized statistical rating organization and other due diligence requirements, the investigation of Act 10 Permissible Investments shall include ensuring that there is an independent credit review (a qualified financial services organization with an active and recognized credit analysis team is also monitoring the issuer, in addition to the nationally recognized statistical rating organization(s)).
5. Act 10 Permissible Investments shall be limited to no more than ten percent (10%) of district funds available for investment, excluding bond proceeds and refunding escrow balances.

Audit

The Board directs that all investment records be subject to annual audit by the District's independent auditors.

Pol. 619



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The audit shall include, but not be limited to independent verification of amounts and records of all transactions, as deemed necessary by the independent auditors.

~~It shall be the responsibility of the investment advisor and/or bidder to maintain necessary documents to permit independent audit of the district's investments.~~

Conflict of Interest Avoidance and Disclosure

Designated officers and employees involved in the District's investment process shall disclose in writing to the Board any material conflict of interest or material potential conflict of interest which exists because of personal relationships or personal business activity between the Investment Officer or other employees and any depository institution, broker, dealer, investment advisor, or other investment provider or professional serving the District. The designated officers or other employees shall refrain from any personal business activity that ~~that could conflict with the proper execution and management of the investment program~~ or could impair their ability to make impartial decisions in managing the annual investment plan.

~~All securities shall be purchased in the name of the school district, and custody of the securities shall be specified within the District's investment program.~~

All depository institutions, repurchase agreement providers, brokers, and investment advisors and managers shall disclose in writing to the District: (1) any fees or other compensation paid to or received from a third party with respect to an district investment; and (2) any ownership of or by a parent corporation which owns any other depository institution, broker, dealer, investment advisor, or other investment provider or professional which does business with the District.

All investment advisors ~~or bidders~~ shall verify in writing or by electronic signature that they have received a copy of this policy. Such written or electronic statement shall indicate that they have read and understand this policy and all applicable statutes related

65 Pa C.S.A. 1101  
et seq.

SC-218  
GASB Stmt. 40

**POLICY NO. 609  
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to school district investments, along with their intent to comply fully with these requirements.

~~The District shall require all investment advisors/bidders to submit annually any or all of the following, as appropriate:~~

- ~~1. Audited financial statements.~~
- ~~2. Proof of National Association of Securities Dealers (NASD) certification.~~
- ~~3. Proof of state registration.~~
- ~~4. Provide annually the rating from a recognized rating agency.~~

~~Disclosure~~

~~Designated officers and employees involved in the District's investment process shall disclose any personal business activity that could conflict with the proper execution and management of the investment program or could impair their ability to make impartial decisions.~~

~~Audit~~

~~The Board directs that all investment records be subject to annual audit by the District's independent auditors.~~

~~The audit shall include, but not be limited to independent verification of amounts and records of all transactions, as deemed necessary by the independent auditors.~~

~~It shall be the responsibility of the investment advisor and/or bidder to maintain necessary documents to permit independent audit of the district's investments.~~

~~Bond Proceeds~~

~~Investment transactions arising from bond proceeds shall be reported to the Board, in accordance with this policy.~~

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Compliance With GAAP

The following is intended to guide district investments as limited by Section 440.1 of the School Code:

- ~~2. District investments shall limit the exposure to loss of principal due to market changes in interest rates.~~
- ~~3. District investments in authorized instruments that are not backed by the “full faith and credit” of the federal or state government shall be limited to those with the highest credit rating available for such instruments issued by a recognized organization.~~
- ~~4. When district funds are invested in any one (1) issuer other than designated depository accounts (which includes external investment pools), and securities issued or explicitly guaranteed by the U.S. Government (owned directly by the District), the amount of the investment shall be unlimited, but the Board shall be notified of such investment monthly.~~

**References:**

School Code – 24 P.S. Sec. 218, 440.1, 511, 521, 621, 622, 623, 624

Ethics Standards And Financial Disclosure – 65 P.A. C.S.A. Sec. 1101 et seq.

Local Government Unit Debt Act – 53 Pa. C.S.A. Sec. 2301 et seq., 8001 et seq., ~~8224~~

Investment of Public Corporation or Authority Funds – 53 P.S. 5406, 5410.1

U.S. Code Chapter 2A Securities and Trust Indentures – 15 U.S.C. 77a et seq., 80a et seq.

Standardizing the Procedures for Pledges of Assets – 72 P.S. 3836-1 et seq.

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Rules and Regulations, Investment Company Act of 1940 –17  
CFR Part 270

Governmental Accounting Standards Board, Statement No. 3, 40

Board Policy – 608, 618, 619

# Policy Guide



Policy No. 209.2

Section PUPILS

Title DIABETES MANAGEMENT

Adopted \_\_\_\_\_

Revised \_\_\_\_\_

| <b>POLICY NO. 209.2<br/>DIABETES MANAGEMENT</b> |   |  |
|---|---|--|
| <b>Section 1</b>                                | <p><b><u>Purpose</u></b></p> <p>The Board recognizes that an effective program of diabetes management in school is crucial to:</p> <ol style="list-style-type: none"> <li>1. The immediate safety of students with diabetes.</li> <li>2. The long-term health of students with diabetes.</li> <li>3. Ensure that students with diabetes are ready to learn and participate fully in school activities.</li> <li>4. Minimize the possibility that diabetes-related emergencies will disrupt classroom activities.</li> </ol> |  |
| <b>Section 2</b>                                | <p><b><u>Authority</u></b></p> <p>The Board adopts this policy in accordance with applicable state and federal laws and regulations, and Board policies and administrative regulations, regarding the provision of student health services.</p>   | <p>Pol. 103.1, 113, 209, 209.1<br/>SC 1401, 1414.3, 1414.5, 1414.7</p> |
| <b>Section 3</b>                                | <p><b><u>Definitions</u></b></p> <p><b>Individualized Education Program (IEP)</b> means the written educational statement for each student with a disability that is developed, reviewed and revised in accordance with federal and state laws and regulations. A student with a disability is a school-aged child within the jurisdiction of the District who has been evaluated and found to have one or more disabilities as defined by law, and who requires, because of such disabilities,</p>                         | <p>Pol. 113</p>  |

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|---|--|---|
| <p><b>Section 4</b></p>   | <p><b>POLICY NO. 209.2</b><br/><b>DIABETES MANAGEMENT</b></p>  |   |
|   | <p>special education and related services.</p>   |   |
|   | <p><b>Section 504 Service Agreement (Service Agreement)</b> means an individualized plan for a qualified student with a disability which sets forth the specific related aids, services, or accommodations needed by the student, which shall be implemented in school, in transit to and from school, and in all programs and procedures, so that the student has equal access to the benefits of the school’s educational programs, nonacademic services, and extracurricular activities. A qualified student with a disability means a student who has a physical or mental disability which substantially limits or prohibits participation in or access to an aspect of the district’s educational programs, nonacademic services or extracurricular activities. All Service Agreements for a student with diabetes shall include a <b>Diabetes Medical Management Plan (DMMP)</b>.</p> | <p>Pol. 103.1</p>                                   |
|   | <p><b>Diabetes Medical Management Plan (DMMP)</b> means a document describing the medical orders or diabetes regimen developed and signed by the student's health care practitioner and parent/guardian.</p>   | <p>SC 1401</p>                                      |
|   | <p><b>Guidelines</b></p>   |   |
|   | <p>Before a student can receive diabetes-related care and treatment in a school setting, the student's parent/guardian shall provide written authorization for such care and instructions from the student's health care practitioner. The written authorization may be submitted as part of a student's DMMP.</p>   | <p>SC 1414.4</p>                                    |
|   | <p>Diabetes-related care shall be provided in a manner consistent with Board policy, district procedures and individualized student plans such as an IEP, Service Agreement or DMMP.</p>   | <p>Pol. 103.1, 113, 209.1<br/>SC 1414.3, 1414.5</p> |
| <p>In order to maintain a student's health and safety, each student's individualized plan shall address what information will be provided to school staff and other adults who have responsibility for the student in the school setting.</p> | <p>Pol. 103.1, 113, 113.1, 810<br/>SC 1414.4</p>   |   |
| <p>Student health records shall be confidential and maintained in accordance with state and federal laws and regulations.</p>   | <p>SC 1409<br/>Pol. 113.4, 216</p>   |   |

**POLICY NO. 209.2  
DIABETES MANAGEMENT**

Training of School Personnel

At a minimum, school nurses and health paraprofessionals shall complete training, on an annual basis, developed by the state or training offered by a licensed health care practitioner with expertise in the care and treatment of diabetes, that includes at a minimum:

1. An overview of all types of diabetes.
2. Means of monitoring blood glucose.
3. The symptoms and treatment for blood glucose levels outside of target ranges, as well as symptoms and treatment for hypoglycemia, hyperglycemia and other potential emergencies.
4. Techniques on administering glucagon and insulin.

If the diabetes-related care provided to a particular student will include administration of diabetes medication via injection or infusion, the Board shall require the following:

1. The parent/guardian and the student's health care practitioner must provide written authorization for such administration; and
2. The trained personnel must receive annual training for such administration from a licensed health care practitioner with expertise in the care and treatment of diabetes.

Other school employees, including classroom teachers, lunchroom staff, and coaches/sponsors, shall receive annual diabetes care training appropriate to their responsibilities for students with diabetes.

Student Possession and Use of Diabetes Medication and Monitoring Equipment

Prior to student possession or use of diabetes medication and monitoring equipment, the Board shall require the following:

SC 1414.3

SC 1414.5  
22 PA Code 12.3

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1. A written statement from the student's health care practitioner incorporated in the Service Agreement that provides:
  - a. Name of the drug.
  - b. Prescribed dosage and/or the method by which dosage should be calculated.
  - c. Times when medication is to be taken.
  - d. Times when monitoring equipment is to be used.
  - e. Length of time medication and monitoring equipment is prescribed.
  - f. Diagnosis or reason medication and monitoring equipment is needed.
  - g. Potential serious reactions to medication that may occur.
  - h. Emergency response.
  - i. Whether the child is competent and able to self-administer the medication or monitoring equipment and to practice proper safety precautions.
2. A written request from the parent/guardian that the school comply with the instructions of the student's health care practitioner. The request from the parent/guardian shall include a statement relieving the district and its employees of responsibility for the prescribed medication or monitoring equipment and acknowledging that the school is not responsible for ensuring that the medication is taken or the monitoring equipment is used.
3. As part of the Service Agreement, a written acknowledgement from the school nurse that the student has demonstrated that s/he is capable of self-administration of the medication and use of the



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monitoring equipment and a written acknowledgement from the student that s/he has received instruction from the student's health care practitioner on proper safety precautions for the handling and disposal of the medications and monitoring equipment, including acknowledgement that the student will not allow other students to have access to the medication and monitoring equipment and that s/he understands appropriate safeguards.

The written request for student possession and use of diabetes medication and monitoring equipment shall be reviewed annually, along with the required written statements from the parent/guardian and the student's health care practitioner. If there is a change in the student's prescribed care plan, level of self-management or school circumstances during the school year, the parent/guardian and the student's health care practitioner shall update the written statements.

Students shall be prohibited from sharing, giving, selling and using diabetes medication and monitoring equipment in any manner other than which it is prescribed during school hours, at any time while on school property, at any school-sponsored activity and during the time spent traveling to and from school and school-sponsored activities. Violations of this policy, provisions of a Service Agreement or IEP, or demonstration of unwillingness or inability to safeguard the medication and monitoring equipment may result in loss of privilege to self-carry the diabetes medication and monitoring equipment, and may result in disciplinary action in accordance with Board policy and applicable procedural safeguards.

If the District prohibits a student from possessing and self-administering diabetes medication and operating monitoring equipment, or if a student is not capable of self-administering diabetes medication or operating monitoring equipment, the District shall ensure that the diabetes medication and monitoring equipment is appropriately stored in a readily accessible location in the student's building. The school nurse and other designated school employees shall be informed where the medication and monitoring equipment is stored and the means to access them.

Pol. 103.1, 113.1,  
218, 227  
SC 1414.5

SC 1414.5

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DIABETES MANAGEMENT**

**Section 5**

**Delegation of Responsibility**

The Superintendent or designee, in conjunction with the school nurse(s), shall develop administrative regulations for care and treatment of students with diabetes in the school setting.

The Superintendent or designee shall coordinate training for school employees. Such training may be included in the district's Professional Education Plan.

The Superintendent or designee shall annually distribute to all staff, students and parents/guardians this policy along with the Code of Student Conduct.

SC 1414.3  
Pol. 100

Pol. 218  
22 PA Code 12.3

References:

School Code – 24 P.S. Sec. 510, 1401, 1409, 1414.3, 1414.4, 1414.5, 1414.7

State Board of Education Regulations – 22 PA Code Sec. 12.3, 12.41

Board Policy – 100, 103.1, 113, 113.1, 113.4, 209, 209.1, 210, 216, 218, 227, 810

Policy No. 210.1

Section PUPILS

# Policy



Title POSSESSION/ADMINISTRATION  
USE OF ASTHMA  
INHALERS/EPINEPHRINE  
AUTO-INJECTORS

# Guide

Adopted DECEMBER 9, 2009

Revised \_\_\_\_\_

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|  | <p style="text-align: center;"><b>POLICY NO. 210.1</b><br/><b>POSSESSION/ADMINISTRATION <del>USE</del> OF ASTHMA</b><br/><b>INHALERS/EPINEPHRINE AUTO-INJECTORS</b></p> <p><b>Section 1</b>     <u><b>Authority</b></u></p> <p>The Board shall permit students to possess asthma inhalers and epinephrine auto-injectors and to self-administer the prescribed medication in compliance with state law and Board Policy used to treat asthma when such is parent authorized.</p> <p><del>Possession and use of asthma inhalers by students shall be in accordance with state law and Board policy.</del></p> <p>The Board shall authorize the District to stock epinephrine auto-injectors in the name of the school district for emergency administration by trained employees to a student believed to be experiencing an anaphylactic reaction.</p> <p><b>Section 2</b>     <u><b>Definitions</b></u></p> <p><b>Anaphylaxis</b> - a sudden, severe allergic reaction that involves various areas of the body simultaneously. In extreme cases, anaphylaxis can cause death.</p> <p><b>Asthma inhaler</b> shall mean a prescribed device used for self-administration of short-acting, metered doses of prescribed medication to treat an acute asthma attack.</p> <p><b>Epinephrine auto-injector</b> shall mean a prescribed disposable drug delivery system designed for the administration of epinephrine to provide rapid first aid for students suffering the</p> | <p>SC 1414.1<br/>Pol. 103.1</p> <p>SC 1414.2</p> <p>SC 1401</p> |
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| <p><b>Section 3</b></p> | <p style="text-align: center;"><b>POLICY NO. 210.1</b><br/> <b>POSSESSION/<del>ADMINISTRATION USE</del> OF ASTHMA<br/> INHALERS/<del>EPINEPHRINE AUTO-INJECTORS</del></b></p> <p>effects of anaphylaxis.</p> <p><b>Self-administration</b> shall mean a student's use of medication in accordance with a prescription or written instructions from a physician, certified registered nurse practitioner or physician assistant.</p> <p><b><u>Guidelines</u></b></p> <p>Administration of asthma inhalers and epinephrine auto-injectors shall comply with Board policy, district procedures and individualized student plans such as an Individualized Education Program (IEP), Section 504 Service Agreement (Service Agreement), Individualized Healthcare Plan (IHP), or Emergency Care Plan (ECP).</p> <p>In order to maintain a student's health and safety, each student's individualized plan shall address what information will be provided to school staff and other adults who have responsibility for the student in the school setting.</p> <p>Student health records shall be confidential and maintained in accordance with state and federal laws and regulations.</p> <p><u>Student Self-Administration of Asthma Inhalers and Epinephrine Auto-Injectors</u></p> <p>Before a student may possess or use an asthma inhaler or epinephrine auto-injector <del>in the on school setting</del> <del>property during school hours or during school-related activities</del>, the Board shall require the following:</p> <ol style="list-style-type: none"> <li>1. A written request from the parent/guardian that the school complies with the order of the physician, certified registered nurse practitioner or physician assistant.</li> <li><del>1.2.</del> A written statement from the licensed physician, certified registered nurse practitioner or physician assistant, <del>on "Form B-1," as attached</del>, that states: <ol style="list-style-type: none"> <li>a. Name of the drug;</li> <li><del>a.b.</del> Prescribed dosage;</li> </ol> </li> </ol> | <p>Pol. 103.1, 113, 209.1, 210<br/> SC 1414.2<br/> 22 PA Code 12.41</p> <p>Pol 103.1, 113, 113.4, 216, 810<br/> SC 1409</p> <p>Pol. 113.4, 216</p> <p>SC 1414.1<br/> 22 PA Code 12.41</p> |
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**POSSESSION/~~ADMINISTRATION~~ ~~USE OF~~ ASTHMA**  
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- c. Times medication is to be taken;
- d. Length of time medication is prescribed;
- e. Diagnosis or reason medication is needed, unless confidential;
- f. Potential serious reaction or side effects of medication;
- g. Emergency response;
- h. If child is qualified and able to self-administer the medication.

3. A written statement from the parent/guardian, ~~on "Form B-2," as attached~~, acknowledging that ~~neither the School District nor any of its employees are~~ is not responsible for ensuring the medication is taken and relieving the District and its employees of responsibility for the benefits or consequences of the prescribed medication.

4. A written acknowledgement from the school nurse that the student has demonstrated that s/he is capable of self-administration of the asthma inhaler and/or epinephrine auto-injector in the school setting. Determination of competency for self-administration shall be based on the student's age, cognitive function, maturity and demonstration of responsible behavior.

~~2.5.~~ A written acknowledgement from the student that s/he has received instruction from the student's licensed physician, certified registered nurse practitioner or physician assistant on proper safety precautions for the handling and disposal of the asthma inhaler and/or epinephrine auto-injector, including acknowledgement that the student will not allow other students to have access to the prescribed medication and that s/he understands appropriate safeguards.

SC 1414.1

| <b>POLICY NO. 210.1</b>   |  |   |
|---|--|---|
| <b>POSSESSION/<del>ADMINISTRATION USE</del> OF ASTHMA INHALERS/<del>EPINEPHRINE</del> AUTO-INJECTORS</b>  |  |   |
| <p>The District reserves the right to require a statement from the physician, certified registered nurse practitioner or physician assistant for the continued use of a medication beyond the specified time period.</p>  |  | SC 1414.1                                   |
| <p>A written request for student use of an asthma inhaler and/or epinephrine auto-injector shall be submitted annually, along with required written statements from the parent/guardian and an updated prescription. If there is a change in the student's prescribed care plan, level of self-management or school circumstances during the school year, the parent/guardian and the licensed physician, certified registered nurse practitioner or physician assistant shall update the written statements.</p> <p><del>The student shall be made aware that the asthma inhaler is intended for his/her use only and may not be shared with other students.</del></p>   |  | SC 1414.1                                   |
| <p>The student shall notify the school nurse immediately following each use of an asthma inhaler or epinephrine auto-injector.</p>  |  | SC 1414.1                                   |
| <p>Students shall be prohibited from sharing, giving, selling, and using an asthma inhaler or epinephrine auto-injector in any manner other than which it is prescribed during school hours, at any time while on school property, at any school-sponsored activity, and during the time spent traveling to and from school and school-sponsored activities. Violations of this policy, provisions of a Service Agreement or IEP, or demonstration of unwillingness or inability to safeguard the asthma inhaler or epinephrine auto-injector may result in loss of privilege to self-carry the asthma inhaler or epinephrine auto-injector and disciplinary action in accordance with Board policy and applicable procedural safeguards.</p> |  | SC 1414.1<br>Pol. 103.1, 113.1,<br>218, 227 |
| <p>If the District denies a student's request to self-carry an asthma inhaler or epinephrine auto-injector or the student has lost the privilege of self-carrying an asthma inhaler or epinephrine auto-injector, the student's prescribed medication shall be appropriately stored at a location in close proximity to the student. The school nurse, other designated school employees and the student's classroom teachers shall be informed where the medication is stored and the means to access the medication.</p>  |  | SC 1414.1                                   |

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**POSSESSION/~~ADMINISTRATION~~ ~~USE~~ OF ASTHMA**  
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~~Violations of this policy by a student shall result in immediate confiscation of the asthma inhaler.~~

~~The District reserves the right to require a statement from the physician, certified registered nurse practitioner or physician assistant for the continued use of a medication beyond the specified time period. Permission for possession and use of an asthma inhaler by a student shall be effective for the school year for which it is granted and shall be renewed each subsequent school year.~~

~~A student whose parent/guardian completes the written requirements for the student to possess an asthma inhaler and self-administer the prescribed medication in the school setting shall demonstrate to the school nurse the capability for self-administration and responsible behavior in use of the medication.~~

~~To self-administer medication, the student must be able to:~~

- ~~1. Respond to and visually recognize his/her name;~~
- ~~2. Identify his/her medication;~~
- ~~3. Demonstrate the proper technique for self-administering medication;~~
- ~~4. Sign his/her medication sheet to acknowledge having taken the medication.~~
- ~~5. Demonstrate a cooperative attitude in all aspects of self-administration.~~

Standing Order From the School Physician

The school physician shall provide and annually renew a standing order for administration of stock epinephrine auto-injectors to students believed to be experiencing an anaphylactic reaction.

The standing order shall include at least the following information:

1. Type(s) of epinephrine auto-injector(s).

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**INHALERS/~~EPINEPHRINE~~ AUTO-INJECTORS**

2. Date of issue.
3. Dosage.
4. Signature of the school physician.

The standing order shall be maintained in the Superintendent's office, and copies of the standing order shall be kept in each location where a stock epinephrine auto-injector is stored.

**Acquisition, Storage and Disposal of Stock Epinephrine Auto-Injectors**

One or more school employees shall be designated within each school to be responsible for the storage and use of the stock epinephrine auto-injectors.

Stock epinephrine auto-injectors shall be safely stored in the school nurse's office or other location designated by the school nurse in accordance with the drug manufacturer's instructions.

Stock epinephrine auto-injectors shall be made readily accessible to those employees who have completed the required training to administer it in the event of a student experiencing an anaphylactic reaction. All properly trained employees shall be informed of the exact location where stock epinephrine auto-injectors are being stored within the school nurse's office or other location.

The school nurse shall obtain sufficient supplies of stock epinephrine auto-injectors pursuant to the standing order in the same manner as other medical supplies acquired for the school health program. The school nurse or designee shall regularly inventory and refresh epinephrine auto-injector stocks, and maintain records thereof, in accordance with the established internal procedures, manufacturer recommendations and Pennsylvania Department of Health guidelines.

SC 1414.2



**POLICY NO. 210.1**  
**POSSESSION/~~ADMINISTRATION USE~~ OF ASTHMA**  
**INHALERS/~~EPINEPHRINE~~ AUTO-INJECTORS**

Administration of Stock Epinephrine Auto-Injectors

When responding to a student believed to be experiencing an anaphylactic reaction, a trained school employee shall:

1. Administer an epinephrine auto-injector that meets the prescription on file for either the student or the District. If the student is authorized to self-administer an epinephrine auto-injector, the trained school employee may provide the student with an epinephrine auto-injector that meets the prescription on file for either the student or the District for self-administration.

Where a student is authorized to self-administer an epinephrine auto-injector, the trained school employee is still responsible for overseeing the injection and/or administering the drug themselves if the student is unable.

2. Call for medical help immediately (dial 9-1-1).
3. Take additional precautions or steps outlined in emergency response procedures and training, including the administration of a second dose of epinephrine, if necessary.
4. Stay with the student until emergency medical help arrives.
5. Cooperate with Emergency Medical Services (EMS) personnel responding to the incident.
6. Notify the school nurse or designee of the incident.

Training

Before any school district employee may be responsible for the storage or administration of epinephrine auto-injectors under this policy, the employee must successfully complete a training course approved by the Pennsylvania Department of Health.

SC 1414.2  
42 Pa. C.S.A. 8332,  
8337.1, 8541, 8545

SC 1414.1

**POLICY NO. 210.1**  
**POSSESSION/~~ADMINISTRATION USE OF~~ ASTHMA**  
**INHALERS/~~EPINEPHRINE~~ AUTO-INJECTORS**

Refresher training shall be completed every two (2) years, and a hands-on demonstration and review of this policy and any accompanying procedures shall be completed annually.

Evidence that such training has been completed shall be placed in the employee's personnel file.

A list of school district employees who successfully complete such training shall be maintained, updated and kept in the school nurse's office and the school district administration office.

Indemnification

The school district shall indemnify and hold harmless any employee who administers an epinephrine auto-injector in good faith to a student experiencing anaphylaxis, if all of these conditions apply:

1. The employee did not act with the intent to harm or with reckless indifference to a substantial risk or harm in administering the epinephrine auto-injector to the student.
2. The employee promptly sought additional medical assistance before or immediately after administering the epinephrine auto-injector.
3. The employee administered the epinephrine auto-injector pursuant to this policy, and the student's individualized plan, if applicable.

SC 1414.1, 1414.9  
42 Pa. C.S.A. 8547,  
8548

**Section 4**     **Delegation of Responsibility**

The Superintendent or designee, in conjunction with the school nurse(s), shall develop procedures for student possession and self-administration of asthma inhalers or epinephrine auto-injectors and emergency response ~~self administration of prescribed medication~~, and for the acquisition, stocking and administration of stock epinephrine auto-injectors, and training of school employees responsible for the storage and use of epinephrine auto-injectors.

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**POSSESSION/ADMINISTRATION ~~USE~~ OF ASTHMA**  
**INHALERS/~~EPINEPHRINE~~ AUTO-INJECTORS**

The Superintendent or designee ~~District~~ shall annually distribute to ~~inform~~ staff, students and parents/guardians ~~about the~~ this policy along with the Code of Student Conduct by publishing such in handbooks and newsletters, on the district’s website, and through posted notices and other efficient methods. ~~and procedures governing student possession and use of asthma inhalers.~~

SC 1414.1, 510.2  
 22 PA Code 12.3  
 Pol. 218

The school physician shall be the prescribing and supervising medical professional for the district’s stocking and use of epinephrine auto-injectors. The Superintendent or designee shall obtain a standing order from the school physician for administration of stock epinephrine auto-injectors.

The school nurse shall be responsible for building-level storage of and administration of stock epinephrine auto-injectors.

SC 1414.2

The building principal shall annually notify parents/guardians of their right to opt-out of the provisions of this policy related to the administration of a stock epinephrine auto-injector. To opt-out, a parent/guardian shall sign and return the district's exemption form to the school nurse. The signed opt-out forms shall be maintained by the school nurse, and the school nurse shall provide trained school employees with the names of students whose parents/guardians have returned a signed opt-out form.

SC 1414.2

~~When an asthma inhaler is initially brought to school by a student, the school nurse shall be responsible to complete the following:~~

- ~~1. Obtain the required written request and statements from the parent/guardian and physician, certified registered nurse practitioner or physician assistant, which shall be kept on file in the office of the school nurse;~~
- ~~2. Review pertinent information with the student and/or parent/guardian, specifically the information contained on the statement submitted by the physician, certified registered nurse practitioner or physician assistant;~~
- ~~3. Determine the student's ability to self-administer medication and the need for care and supervision;~~
- ~~4. Maintain an individual medication lot for all students~~

**POLICY NO. 210.1**  
**POSSESSION/~~ADMINISTRATION~~ ~~USE~~ OF ASTHMA**  
**INHALERS/~~EPINEPHRINE~~ AUTO-INJECTORS**

~~possessing asthma inhalers.~~

References:

School Code - 24 P.S. Sec. 510.2, 1401, 1409, 1414.1, 1414.2,  
1414.9

State Board of Education Regulations –22 PA Code Sec. 12.3,  
12.41~~7.13~~

Title 42 – 42 Pa. C.S.A. 8332, 8337.1, 8541, 8545, 8547, 8548

Board Policy – 103.1, 113, 113.1, 113.4, 209.1, 210, 216, 218,  
810, 227

# Policy Guide



Policy No. 919

Section COMMUNITY

Title TITLE I PARENT/~~GUARDIAN~~ AND FAMILY ENGAGEMENT

Adopted DECEMBER 2, 2014

Revised DECEMBER 12, 2017

Reviewed NOVEMBER 22, 2016; NOVEMBER 17, 2015

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| <p><b>POLICY NO. 919</b><br/> <b>TITLE I PARENT/<del>GUARDIAN</del> AND FAMILY ENGAGEMENT</b></p> |  |  |
| <p><b>Section 1</b></p>   | <p><b><u>Purpose</u></b></p> <p>The Board recognizes that parent/<del>guardian</del> and family engagement contributes to the achievement of academic standards by students participating in Title I programs. The Board views the education of students as a cooperative effort among the school, parents/<del>guardians</del> and family members, and community.</p>   | <p>20 U.S.C. Sec. 6318<br/>                 Pol. 102</p> |
| <p><b>Section 2</b></p>   | <p><b><u>Definition</u></b></p> <p><b>Parent and Family (Family Member)</b> - these terms are used interchangeably and shall include caregivers, a legal guardian or other person standing in loco parentis such as a grandparent or stepparent with whom the child lives, a person who is legally responsible for the child's welfare, or a legally appointed Education Decision Maker of a child participating in a Title I program.</p> |  |
| <p><b>Section 2</b></p>   | <p><b><u>Authority</u></b></p> <p><del>In compliance with federal law, the District and parents/guardians of students participating in Title I programs shall jointly develop and agree upon a written Parent/Guardian and Family Engagement policy. When developing and implementing this policy,</del> The Board directs the District and</p>  | <p><del>ESEA Sec. 1118</del></p> <p>20 U.S.C. Sec.</p>   |

**POLICY NO. 919  
TITLE I PARENT/~~GUARDIAN~~ AND FAMILY  
ENGAGEMENT**

each of its schools with a Title I program to ~~shall ensure the policy describes how the District will:~~

6318

1. Conduct outreach to all parents and family members.
- ~~1.2.~~ Engage parents/~~guardians~~ in the joint development of the District's overall Title I plan and the process of school review and improvement as necessary.
3. Engage parents and family members in the development of the Title I Parent and Family Engagement Policy. Following adoption of the policy by the Board, the policy shall be:
  - a. Incorporated into the district's Title I plan.
  - b. Posted to the district's publicly accessible website and be available in writing upon request.
  - c. Evaluated annually with parent and family engagement.
- ~~2.4.~~ Provide opportunities and conduct meaningful collaborations with parents and family members in planning and implementation of Title I programs, activities, and procedures. ~~the coordination, technical assistance and other support necessary to assist participating schools in planning and implementing effective parental engagement activities to improve student academic achievement and school performance.~~
- ~~3.~~ ~~Develop activities that promote the schools' and parents'/guardians' capacity for strong parental involvement.~~
- ~~4.~~ ~~Coordinate and integrate parental engagement strategies with appropriate federal, state, and local programs, as provided by law.~~
- ~~5.~~ ~~Engage parents/guardians in an annual evaluation of the content and effectiveness of the policy in improving the academic quality of schools served under Title I.~~

20 U.S.C. Sec.  
6312  
SC 510.2

ESEA Sec. 1118

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**TITLE I PARENT/~~GUARDIAN~~ AND FAMILY**  
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~~6. Identify barriers to participation by parents/guardians who are economically disadvantaged, are disabled, have limited English proficiency, have limited literacy, or are of any racial or ethnic minority.~~

~~7. Use findings of annual evaluations to design strategies for more effective parental/guardian engagement.~~

~~8. Engage parents/guardians in the activities of schools served under Title I including engaging with school personnel and teachers.~~

~~9. Engage parents/guardians in the training of teachers, pupil services personnel and principals.~~

~~The Board shall adopt and distribute the parental/guardian and family engagement policy, which shall be incorporated into the District's Title I plan and shall be evaluated annually, with parental/guardian engagement.~~

**Section 3**

**Guidelines**

Each district school operating a Title I program shall hold a ~~an~~ annual meeting of parents/~~guardians~~ and family members at a convenient time ~~of participating Title I students shall be held to~~ explain the goals and purposes of the Title I programs and to inform them of their right to be involved. ~~, jointly develop a parental and family engagement policy, and review Title I parent complaint procedures.~~ Parents and family members/~~Guardians~~ shall be given the opportunity to participate in the design, development, operation and evaluation of the ~~parent/guardian engagement program. ; including making spending decisions regarding the 1% of Title I Part A funds reserved for parent/guardian engagement. Parent/Guardians are encouraged to work with Title I teachers in their child's school to assist in the plans.~~ Parents and family members/~~Guardians~~ shall be encouraged to participate in planning activities, to offer suggestions, and to ask questions regarding policies and programs, through the Title I Parent Advisory Council, survey, and Parent-Faculty organization meetings.

20 U.S.C. Sec.  
6318 ~~ESEA Sec.~~  
1118

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The schools with Title I programs shall offer a flexible number of meetings which shall be held at various times of the morning and evening. Title I funds may be used to enable parent and family member attendance at meetings through payment of transportation, child care costs or home visits.

~~ESEA Sec. 1118~~  
20 U.S.C. Sec.  
6318

The schools shall involve parents and family members in an organized, ongoing and timely way, in the planning, review and improvement of Title I programs, the Title I Parent and Family Engagement Policy and the joint development of the Title I Plan.

20 U.S.C. 6318,  
6312

~~In addition to the required annual meeting, additional parent/guardian meetings and training opportunities shall be held at various times of the day and evening.~~ At these meetings, parents/guardians shall be provided:

20 U.S.C. 6318

1. ~~Timely~~ Information about -Title I programs and district and school level parent/guardian engagement activities.
2. Description and explanation of academic content standards, the curriculum in use, the forms of academic assessment used to measure student progress, and the ~~achievement~~~~proficiency~~ levels students are expected to meet.
3. Opportunities to formulate suggestions and to participate, as appropriate, in decisions relating to the education of their children.~~for training and information in areas related to literacy development, how parent/guardians can assist at home in the education of their child, how to use technology to support learning, and parenting skills. Parents/guardians are invited to participate in the training of teachers, pupil services personnel and the principals in areas related to:~~

To ensure the continuous engagement of parents and family members in the joint development of the Title I Plan and with the school support and improvement process, the district shall:

1. Establish meaningful, ongoing two-way communication between the district, staff and parents and family



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**ENGAGEMENT**

members.

2. Communicate with parents and family members about the plan and seek their input and participation through efficient means of communication such as, the use of newsletters, the district website, email, telephone, parent and teacher conferences, and home visits if needed.
3. Train personnel on how to collaborate effectively with parents and family members with diverse backgrounds that may impede their participation, such as limited literacy or language difficulty.
4. Analyze and share the results of the Title I Parent/Family Survey.
5. Post school performance data on the district's website.
6. Distribute and discuss the School-Parent and Family Compact.
7. Host various parent and family nights at each school building with a Title I program.
8. Establish and support active and engaged Title I parent and family advisory councils. The council will include a majority of parents and family members of students participating in Title I programs, as well as the building principal, teachers or other appropriate staff, students and community members. The purpose of the council shall be to focus on improved student achievement, effective classroom teaching, parent/family/community engagement in the educational process, and to facilitate communications and support.
9. Actively recruit parents and family members to participate in school review and improvement planning.
10. Assign district representatives to be available to work collaboratively with parents and family members, and to conduct school-level trainings to promote understanding

~~Pol. 102~~

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of school data, comprehensive plans and the budgeting process.

11. Invite participation of parents and family members at the regular comprehensive planning committee meetings, Title I budget meetings and school improvement plan meetings to obtain input and propose school improvement initiatives.

~~a. The value and utility of parent contributions.~~

~~b. How to reach out to and communicate with parents.~~

~~c. How to work with parents as equal partners.~~

~~d. How to implement and coordinate parent programs.~~

~~4. Information on best practices focused on parent/guardian and family engagement, especially best practices for increasing the engagement of economically disadvantaged parents/guardians and family members.~~

~~If sufficient, Title I may be used to facilitate parent/guardian attendance at meetings through payment of transportation and child care costs.~~

If the Title I Plan is not satisfactory to parents and family members, the District shall submit any parent or family member comments with the plan when the school makes the plan available to the Board.

Building Capacity for Parent and Family Engagement

The District shall provide the coordination, technical assistance, and other support necessary to assist and build the capacity of all participating schools in planning and implementing effective parent and family involvement activities to improve academic achievement and school performance through:

20 U.S.C. Sec.  
6318, 6312

20 U.S.C. Sec.  
6318

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1. Providing assistance to parents and family members in understanding such topics as the academic standards, state and local academic assessments, the requirements of parent and family involvement, how to monitor a child's progress and work with teachers to improve the achievement of their children.

Pol. 102, 127

2. Providing material and training to help parents and family members work with their children to improve academic achievement and to foster parent and family engagement, such as:

a. Scheduling trainings in different locations on a variety of topics including how to support their child in school, literacy, school safety, cultural diversity and conflict resolution.

b. Using technology, including education about the harms of copyright piracy, as appropriate.

Pol. 814

c. Providing information, resources and materials in a user friendly format.

d. Providing, as requested by a parent or family member, other reasonable support for parent and family engagement activities.

e. Training on how to use the Parent Portal as a tool to monitor grades and achievement.

~~1~~3. Educating teachers, specialized instructional support personnel, principals and other school leaders and staff, with the assistance of parents and family members, on the value and usefulness of contributions of parents and family members and in how to reach out to, communicate with, and work with them as equal partners, implement and coordinate parent and family programs, and build ties between parents and family members and the school.

Pol. 333

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4. To the extent feasible and appropriate, coordinating and integrating Title I parent and family involvement efforts and activities with other federal, state and local programs, including public preschool programs, and conduct other activities, such as parent resource centers, that encourage and support parents and family members in more fully participating in the education of their children.
5. Engage the parent organizations (i.e. PFO) to actively seek out and involve parents and family members through regular updates, information sessions and assistance with the identification of effective communication strategies.
6. Train parents and family members to enhance the involvement of other parents and family members.
7. Adopt and implement model approaches to improving parent and family engagement.
8. Establish a district-wide Title I parent and family advisory council to provide advice on all matters related to parent and family engagement in Title I programs.
9. Engage community-based organizations and businesses in parent and family engagement activities.

20 U.S.C. Sec. 2318, 7845  
 Pol. 140, 212  
 29 U.S.C. Sec. 3271 et seq.  
 42 U.S.C. Sec. 11301 et seq., 9831 et seq.

Coordinating Parent and Family Engagement Strategies

The District shall coordinate and integrate Title I parent and family engagement strategies with other parent and family engagement strategies required by federal, state, and local laws by:

1. Involving district and program representatives to assist in identifying specific parent and family member needs.
2. Sharing data from other programs to assist in developing initiatives to advance academic achievement and school improvement.

20 U.S.C. Sec. 6318, 7845  
 Pol. 140, 212  
 29 U.S.C. Sec. 3271 et seq., 701 et seq  
 42 U.S.C. Sec. 11301 et seq.,9831 et seq.

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~~Opportunities shall be provided for parents/guardians to meet with the classroom and Title I teachers to discuss their child's progress and formulate suggestions, and participate as appropriate, in decisions relating to the education of their children. During the annual Title I program evaluation, parents/guardians of Title I student assess the effectiveness of the program and offer recommendations to enhance program effectiveness.~~

~~Parents/Guardians may be given guidance as to how they can assist at home in the education of their child.~~

Annual ~~Review of the Title I~~ Parent and Family Engagement Policy Evaluation

The District shall conduct, with meaningful participation of ~~Title I~~ parents and family members, and annual evaluation of the content and effectiveness of this policy in improving the academic quality of all district schools with a Title I program. ~~/guardians representing all of Keystone Oaks School District's schools meet annually to develop and agree upon a written District Title I Parent/Guardian Engagement and Family Policy and participate in an annual Title I evaluation. During the annual evaluation, parent/guardian feedback is gathered using surveys. Results from this evaluation are used to make modifications, revisions, or enhancements to Title I parent/guardian engagement opportunities, policy, and programs.~~

The evaluation shall identify:

1. Barriers to parent and family member participation, with particular attention to those who are migrants, are economically disadvantaged, have a disability, have limited English proficiency, have limited literacy, or are of any racial or ethnic minority.
2. The needs of parents and family members to assist with the learning of their children, including engaging with school personnel and teachers.

20 U.S.C. Sec.  
6318

20 U.S.C. Sec.  
6318

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3. Strategies to support successful school and parent and family interactions.

The evaluation shall be conducted through:

1. Establishment of a schedule and process for the policy review and revision by parents and family members.
2. An evaluation of the effectiveness of the content and communication methods through a variety of methods.
3. A parent and family member and teacher survey designed to collect data on school level and district-wide parent and family engagement outcomes.
4. Focus groups. Parents and family members, and community members, unable to attend the focus groups in person shall have an opportunity to participate in an alternate format.
5. Documentation of parent and family member input regarding Title I programs and activities from throughout the year.
6. A Title I parent and family advisory council comprised of a sufficient number and representative group of parents and family members to adequately represent the needs of the district's Title I population.

The District shall use the findings of the annual evaluation to design evidence-based strategies for more effective parent and family engagement, and to revise, if necessary, the district's Title I Parent and Family Engagement Policy.

20 U.S.C. Sec.  
6318

School-Parental Compact

Each school in the District receiving Title I funds shall jointly develop with parents and family members/~~guardians~~ of students served in the program a School-Parent and Family~~a~~ Compact

20 U.S.C. Sec.  
6318

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~~and Title I School Parent/Guardian and Family Engagement Policy~~ outlining the manner in which parents and family members/~~guardians~~, the entire school staff and students will share responsibility for improved student academic achievement and the means by which the school and parents and family members will build and develop partnerships to help children achieve the ~~in-meeting~~ academic standards. The compact shall:

1. Describe the school's responsibility to provide high-quality curriculum and instruction in a supportive and effective learning environment, enabling students in the Title I program to meet the District's academic standards.
2. ~~Describe~~**Indicate** the ways in which parents and family members/~~guardians~~ will be responsible for supporting their children's learning; ~~such as monitoring attendance, homework completion, and television watching;~~ volunteering in the classroom; and participating, as appropriate, in decisions related to their child's education and positive use of extracurricular time.
3. Address the importance of ongoing two-way, meaningful communication between parents/family members and - teachers ~~communication on an ongoing basis through~~, at a minimum, annual parent-teacher conferences at the elementary level, frequent reports to parents and family members on their child's progress/~~guardians~~, and reasonable access to staff, opportunities to volunteer and participate in their child's class, and observation of classroom activities.

Pol. 916

Pol. 916

Title I Funds

Unless exempt by law, the District shall reserve at least one percent (1%) of its Title I funds to assist schools in conducting parent and family engagement activities. Parents and family members shall be involved in the decisions regarding how the Title I reserved funds are used for parent and family engagement activities.

20 U.S.C. Sec.  
6318

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Not less than ninety percent (90%) of the reserved funds shall be distributed to district schools with a Title I program, with priority given to high need schools. The District shall use the Title I reserved funds to conduct activities and strategies consistent with this policy, including:

20 U.S.C. Sec.  
6318

1. Supporting schools and nonprofit organizations in providing professional development for the district and school personnel regarding parent and family engagement strategies, which may be provided jointly to teachers, principals, other school leaders, specialized instructional support personnel, paraprofessionals, early childhood educators, and parents and family members.
2. Supporting programs that reach parents and family members at home, in the community, and at school.
3. Disseminating information on best practices focused on parent and family engagement, especially best practices for increasing the engagement of economically disadvantaged parents and family members.
4. Collaborating or providing subgrants to schools to enable such schools to collaborate with community-based or other organizations or employers with a record of success in improving and increasing parent and family engagement.
5. Engaging in any other activities and strategies that the district determines are appropriate and consistent with this policy.

Documentation of Parent and Family Engagement Practices

Documentation to track the implementation of this policy is an essential part of compliance and may include, but not be limited to, sign-in sheets at workshops, meetings and conferences; schedules, training and informational materials; communications and brochures; and meeting notes.



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| <p><b>Section 4</b></p> | <p style="text-align: center;"><b>POLICY NO. 919</b><br/><b>TITLE I PARENT/<del>GUARDIAN</del> AND FAMILY</b><br/><b>ENGAGEMENT</b></p> <p><u>Accessibility</u></p> <p>The District and each of its schools with a Title I program shall provide communications, information and school reports to parents and family members who are migrants or who have limited English proficiency, a disability, limited literacy, or racial and ethnic minority backgrounds, in a language they can understand.</p> <p><b><u>Delegation of Responsibility</u></b></p> <p>The Superintendent or designee shall ensure that the District's Title I Parent/<del>Guardian</del> and Family Engagement Policy, plan and programs comply with the requirements of federal law.</p> <p>The Federal Programs Coordinator and/or Title I staff shall <del>notify</del><u>provide to</u> parents and family members/<del>guardians</del> of the existence of the Title I programs and <del>provide</del><u>students participating in Title I programs:</u></p> <ol style="list-style-type: none"> <li>1. <del>An e</del><u>Explanation</u> of the reasons supporting their child's selection for the program.</li> <li>2. <del>A s</del><u>Set</u> of goals and expectations/<del>objectives</del> to be addressed.</li> <li>3. <del>A d</del><u>Description</u> of the services to be provided.</li> </ol> <p><del>3.4.</del><u>A copy of this policy and the School-Parent and Family Compact.</u></p> <p>Parents and family members shall actively carry out their responsibilities in accordance with this policy and the School-Parent and Family Compact. At a minimum, parents and family members shall be expected to:</p> <ol style="list-style-type: none"> <li>1. Support their child's learning.</li> </ol> | <p>20 U.S.C. Sec. 6318<br/>Pol. 140</p> <p>20 U.S.C. Sec. 6318, 6312</p> <p>20 U.S.C. Sec. 6318<br/><del>ESEA Sec. 1118</del><br/><del>Pol. 140</del></p> |
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2. Participate, as appropriate, in decisions relating to the education of their child and positive use of extracurricular time.

The Superintendent or designee shall ensure that the District and its schools with Title I programs provide opportunities for the informed participation ~~information and reports provided to~~ of parents and family members/~~guardians~~ by providing resources, information and school reports ~~are~~ in an understandable and uniform format or, upon request, in another format. Such efforts shall include: ~~and, to the extent practicable, in a language the parents/guardians can understand.~~

1. Providing communications in clear and simple language.
2. Posting information for parents and family members on the district's website.
3. Including a telephone number for parents and family members to call with questions.
4. Partnering with community agencies which may include libraries, recreation centers, community-based organizations and faith-based organizations to assist in sharing information.
5. Provide language access services to families with limited English proficiency through on-site or telephonic translation and interpretation services, as appropriate.

Pol. 140

References:

School Code – 24 PA Sec. 510.2

~~State Board of Education Regulations – 22 PA Code Sec. 403.1~~

Elementary and Secondary Education Act – 20 U.S.C. Sec. 6312, 6318, 7845 ~~ESEA Sec. 1118~~

Rehabilitation Act – 29 U.S.C. Sec. 701 et seq.

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Adult Education and Family Literacy Act – 20 U.S.C. Sec. 3271 et seq.

Head Start Act – 42 U.S.C. Sec. 9831 et seq.

The McKinney-Vento Homeless Assistance Act – 42 U.S.C. Sec. 11301 et seq.

Board Policy – 102, 140, 127, 212, 814, 916