WRCCS CHARTER SCHOOL POLICY MANUAL

Policies developed and adapted for charter schools by Wisconsin Association of School Boards, Inc., Boardman & Clark LLP, and Wisconsin Resource Center for Charter Schools, July 2021

This resource was developed by WRCCS at CESA 9 between 2018-2023 with funding from Wisconsin's federal Charter Schools Program grant from the U.S. Department of Education. See wrccs.org for more information.

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CHARTER SCHOOL
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Introduction

The Wisconsin Legislature established the Wisconsin charter school law in 1993 to create educational alternatives for students. Charter schools are public schools governed by a contract between a governance board and a school authorizer. The Wisconsin charter school law prescribes the contractual relationship between the governance board and authorizer, sets forth the duties and powers of both entities, establishes a funding mechanism, and creates a framework for virtual charter schools. (*See* Wis. Stat. §118.40) Charter schools are generally exempt from Wisconsin laws governing traditional public schools. This exemption allows flexibility and autonomy in school operations and curriculum. In exchange, charter schools have increased accountability via oversight by the authorizer.

Types of Charter Schools

Under the Wisconsin charter school law, Wis. Stat. §118.40, charter schools may be authorized in the following ways:

District-Authorized Charter Schools

In general, a charter school authorized by a school district must be located in the school district. If two or more school districts enter into a contractual relationship to establish a charter school, the school must be located in one of the establishing districts.

District-authorized Instrumentality Charter School. A school district may authorize a charter school pursuant to Wis. Stat. §118.40(2m) and determine it will be an instrumentality of the school district. The school district must employ all personnel of an instrumentality charter school.

District-authorized Non-instrumentality Charter School. A school district may authorize a charter school pursuant to Wis. Stat. §118.40(2m) and determine it will not be an instrumentality of the school district. A school district may not employ any charter school personnel of a non-instrumentality charter school.

Virtual Charter School. A school district may authorize a virtual charter school pursuant to Wis. Stat. §118.40 (8). A virtual school is defined in statute as one in which all or a portion of instruction is provided on the Internet, and pupils and staff are geographically remote from each other.

Consortium Charter School. Pursuant to Wis. Stat. §118.40 (3)(c), a school district may enter into a contract to establish a charter school with one or more other school districts, a cooperative educational service agency, or a federally-recognized American Indian tribe or band in the.

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Independent Charter Schools

Independent 2r Charter Schools. A charter school may be authorized by the following entities pursuant to §118.40(2r):

- The common council of the city of Milwaukee
- The chancellor of any institution in the University of Wisconsin System
- Each technical college district board
- Waukesha County Executive
- College of Menominee Nation
- Lac Courte Orielles Ojibwa Community College

Independent 2x Charter Schools. A charter school may be authorized by the UW-System Office of Educational Opportunity.

Independent charter schools are considered non-instrumentality schools. No school district may employ personnel of an independent charter school. With a few limited exceptions, independent charter schools may admit students from anywhere in Wisconsin.

This Policy Manual

Governance boards are charged with operating charter schools. As such, they must ensure the school operates in compliance with applicable state and federal law and the charter contract, provide students and parents with information needed to comply with the rules and expectations of the school, employ personnel (independent and non-instrumentality only), manage charter school funds, and support community relations.

To do so, governance boards need a comprehensive set of policies which clearly and concisely address their obligations under the law, communicate the charter school's mission, provide direction to administration, staff, and students, and ensure consistency in decision-making.

The purpose of this policy manual is to provide charter schools with an initial set of policy templates. Please note that the laws which guide the policies recommended in this manual are not static – they are subject to change and are frequently revised. Governance boards should not rely solely on these policies but rather use them as a guide and resource in developing policies specific to their schools. Further, boards should consult with their attorneys on all specific policy decisions.

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GOVERNANCE

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CHARTER SCHOOL MISSION

Adopted ___, 2021

The mission and vision of [SCHOOL NAME] ("School") is [fill in here]

NONDISCRIMINATION

Adopted ____, 2021

(1) No student will be denied admission to, or participation in or the benefits of, or be discriminated against in any Charter School program, operation or activity on the basis of race, color, creed, religion, age, sex, sexual orientation, gender identity or expression, national origin, ancestry, disability, pregnancy, marital or parental status, or any other category protected by law, including physical condition or disability.

(2) No employee of the Charter School will be discriminated against on the basis of race, color, creed, religion, age, sex, sexual orientation, gender identity or expression, national origin, ancestry, disability, pregnancy, marital or parental status, genetic information, arrest record, conviction record, military service, veteran status, use or nonuse of lawful products off the employer's premises during nonworking hours, declining to attend a meeting or participate in any communication about religious matters or political matters, or any other category protected by law.

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CHARTER SCHOOL LEGAL STATUS

Adopted ___, 2021

The official name of the charter school is [SCHOOL NAME] ("School").

The School is a public charter school authorized by ________ under Wis. Stat. 118.40(____), and other applicable laws and regulations.

The School is a public charter school operating grade levels______.

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BOARD OF DIRECTORS LEGAL STATUS

Adopted ___, 2021

[SCHOOL NAME] ("School") is governed by the Board of Directors of [NAME], a Wisconsin nonstock corporation. The Board is comprised of not fewer than three (3) and not more than ______ members. Election, resignation, removal, vacancies, and appointment of officers of the Board shall be governed by the Bylaws of [NAME]

The Board shall be nonsectarian in its programs, admissions policies, employment practices, and all other operations. State law expressly grants the Board all the powers necessary to carry out the terms of its charter contract with the ______________________. Such powers include, but are not limited to the following: [You can edit the list below]

1. Receive and disburse funds for school purposes.
2. Secure appropriate insurance.
3. Enter into contracts, including contracts with a University of Wisconsin institution or college campus, technical college district board, or private college or university, for technical or financial assistance, academic support, curriculum review, or other services.
4. Incur debt in reasonable anticipation of the receipt of funds.
5. Pledge, assign, or encumber its assets to be used as collateral for loans or extensions of credit.
6. Solicit and accept gifts or grants for school purposes.
7. Acquire real property for its use.
8. Sue and be sued in its own name.
9. Expend all funding including, budget expenditures, grant funds, and funds donated specifically to the Charter School or generated through sales of Charter School equipment.
10. Set the school year calendar and daily schedule.
11. Adopt and implement curriculum and instruction.
12. Enact policies and procedures unique to the daily operations of the Charter School.
13. Operate and manage facilities utilized by the Charter School.
14. Develop and implement marketing, registering, and enrollment processes.
15. Oversee charter school operations and procedures.

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AUTHORITY OF CHIEF EDUCATION OFFICER

IN THE ABSENCE OF BOARD POLICY

Adopted ___, 2021

The Board of Directors of [NAME], recognizes that Board policies will not address all topics and issues or every scenario that will arise in the day-to-day management and operation of [SCHOOL NAME] ("School"). The Board also recognizes that the Chief Executive Officer ("CEO") is charged with the general supervision and management of the professional work of the schools and the promotion of students, and that the Board itself expects the CEO and The School's other administrators and supervisors to effectively perform the duties and responsibilities of their respective positions and to act as effective agents of the Board within their respective spheres of authority.

Because Board policy may not cover all aspects of governance, the Board shall delegate to the CEO the function of specifying required actions and designing the detailed procedures under which the School will be operated. These detailed procedures shall constitute the administrative guidelines governing the School, consistent with statutes or regulations of the State of Wisconsin or the policies of the Board.

Administrative guidelines shall be binding on the employees and the students of The School.

In the absence of Board policy, the CEO has the authority to take necessary action. Such action shall be reported to the Board at the next meeting following such action.

Whenever an administrator or supervisor other than the CEO concludes that a situation involving the absence of Board policy clearly calls for either the adoption of a Board policy or another Board-level decision, he/she is expected to bring the issue to the attention of the CEO before taking administrative action under this policy whenever it is practical to do so. The CEO shall then determine whether it would be practical and reasonable to refer the matter to the Board for a decision and resolution in the first instance.

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BOARD MEETINGS- AGENDA PREPARATION AND DISSEMINATION

Adopted ___, 2021

The Chair of the Board of Directors of [NAME], and Chief Education Officer (“CEO”) of [SCHOOL NAME] (“School”) shall work collaboratively to determine and prepare the agendas for regular and special meetings of the Board, except that they shall (1) adhere to any specific direction provided by the Board or Board policy, and (2) include on the agenda of any special meeting any subject matter that was the specific reason for calling or requesting such special meeting. In the event of a disagreement between the Board Chair and CEO over the inclusion or exclusion of a specific topic or item of business, the Chair shall have the authority to make the final decision in the absence of any applicable Board directive.

Any Board committee, individual Board member, individual staff member, parent, or other member of the school community may suggest or request the inclusion of an item of business on a future meeting agenda by submitting the request in writing to the attention of the CEO. However, the Board Chair and CEO need to prioritize and limit the scope of the agendas for specific meetings, and the Board retains for itself the discretion to make final decisions regarding when, if at all, particular items of business will be included on an agenda for a Board meeting. Accordingly, suggesting or requesting an item for possible consideration in no way guarantees actual placement of the item on a meeting agenda.

If an individual Board member, a committee chairperson acting on behalf of a Board committee, or the CEO disagrees with the Board Chair’s decision not to include a particular item of business on the agenda for a particular meeting, such person may insist that the next regular meeting of the Board include an agenda setting topic where the Board as a whole may (1) decide when, if at all, the issue or topic in question will be calendared for further substantive discussion and/or possible action, or (2) refer the issue or topic for further evaluation (e.g., to a committee or to the administration).

The Board may use a consent agenda to keep management of routine matters within a reasonable time frame by allowing them to be included in a single resolution for Board consideration. Consent agenda items should be those that are routine, self-explanatory or not likely to require additional information, non-controversial, not expected to call for extensive deliberation, and not expected to give rise to differing opinions.

A member of the Board may request any item to be removed from the consent agenda and defer it for a specific action and more discussion. No vote of the Board will be required to remove an item from the consent agenda. A single member's request shall cause it to be relocated as an action item eligible for discussion. Any item on the

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consent agenda may be removed and discussed as a non-action item or be deferred for further study and discussion at a subsequent Board meeting if the CEO or any Board member thinks the item requires further discussion.

Board packets of the agenda and background materials that support the agenda of any Board meeting are intended to be provided to Board members in sufficient time before the meeting so that Board members may review the material and give items of business sufficient consideration. As a general guideline for regular meetings, and with such exceptions as may occur from time to time, the CEO shall coordinate the distribution of a meeting agenda (even if tentative) and the available supporting materials to Board members at least ________ prior to each regular Board meeting.

The Board shall transact business according to the agenda prepared by the CEO and Board Chair and submitted to all Board members in advance of the meeting. The order of business may be altered at any meeting by a majority vote of the members present.

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RULES OF ORDER

Adopted ___, 2021

The Chair of the Board of Directors of [NAME], or in his/her absence the Vice Chair, shall preside at all regular and special Board meetings and call the meetings to order. Every Board meeting shall initially be convened in open session, although the Board may thereafter convene and hold a closed session to the extent permitted by law and consistent with applicable legal requirements.

It shall be the duty of the presiding officer to preserve order and decorum at the meeting and to decide questions of rules and order, subject to an appeal to the Board as a whole that is supported by any two individual members. The presiding officer, like any other Board member, votes on all matters coming before the Board in the absence of a valid reason to abstain from voting (e.g., a conflict of interest).

In the absence of any specific legal requirement or any local rule of order or procedure that has been established by the Board, the Board directs the presiding officer to rely on *Robert's Rules of Order* (including the procedures and procedural flexibility that *Robert's Rules* allows for small boards) to conduct Board meetings, and the presiding officer and Board will refer to *Robert's Rules* or their knowledge thereof to resolve procedural inquiries, points of order, objections, and appeals during Board meetings. However, any misapplication of or failure to precisely follow *Robert's Rules* or any other local discretionary procedural rule(s) shall not, standing alone, be construed to render any decision made by the Board void, voidable, or otherwise invalid. Such rules are intended for the benefit of the Board and its members, and individual members are expected to raise procedural inquiries, points of order, objections, and appeals at meetings on a timely basis.

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PUBLIC PARTICIPANTS AT BOARD MEETINGS

Adopted ___, 2021

Periods of public comment may be established and placed on the agenda for any regular or special meeting or committee meeting of the Board of Directors of [NAME]. When such periods are authorized, the following guidelines shall be used to ensure an effective method of receiving information from the public.

A. Written correspondence may be sent to the Board Chair or Board Secretary. Written correspondence shall also be accepted at Board and committee meetings.

B. Individuals wishing to speak in-person at a Board meeting at which public comment is included on the meeting agenda may register by notifying the Board Chair or Board Secretary prior to the meeting, or by submitting a "Request to Speak" form to the Board Chair or Board Secretary prior to the public comment portion of the meeting. If the Board meeting provides the opportunity for virtual public comment, individuals wishing to comment virtually must register to speak by notifying the Board Chair or Board Secretary by noon on the date of the meeting (individuals will be provided a link to the virtual meeting). The opportunity for virtual public comment will appear on the meeting agenda notice.

C. Persons addressing the Board may comment on any issue concerning The School. Each speaker shall be allowed no more than [# of minutes, 3 is typical] minutes to address an issue or express an opinion. A maximum of [# of minutes] minutes per meeting shall be designated for public appearances. Speakers shall be called in the order in which they registered. To the extent any speaker addresses the Board for less than his/her maximum allotted time, the speaker is not permitted to reserve the remainder or donate his/her remaining time to another speaker. Any deviation from these guidelines shall be at the discretion of the Board Chair.

D. The Board may, but is not required to, discuss matters raised by the public during the public comment portion of the meeting.

E. The Board Chair, or other presiding officer, may:

   1. interrupt, warn, or terminate any speaker's statement when the statement is too lengthy, personally directed, abusive, obscene, or irrelevant;

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2. request any individual to leave the meeting when that person does not observe reasonable decorum;

3. request the assistance of law enforcement officers in the removal of a disorderly individual when that individual's conduct interferes with the orderly progress of the meeting;

4. call for a recess or an adjournment to another time when the lack of public decorum so interferes with the orderly conduct of the meeting as to warrant such action; or

5. waive these rules with the approval of the Board when necessary for the protection of privacy or the administration of the Board's business.

F. Recording, filming, or photographing the Board's open meetings is permitted. The person operating the equipment should contact the CEO prior to the Board meeting to review possible placement of the equipment, and must agree to abide by the following conditions:

1. No obstructions are created between the Board and the audience.

2. No interviews are conducted in the meeting room while the Board is in session.

3. No commentary, adjustment of equipment, or positioning of operators is made that would distract either the Board or members of the audience or otherwise disrupt the meeting while the Board is in session.

G. If a person who intends to address the Board at an upcoming meeting wishes to request a reasonable accommodation that will better enable that individual to have meaningful access to the public comment forum, he/she may make that request by contacting the CEO in advance of the meeting. Advance notice of at least one (1) full business day is usually a sufficient period of time for the Board to consider and respond to such a request.

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OPEN MEETINGS

Adopted ___, 2021

The Board of Directors of [NAME], has a duty to conduct the business of [NAME] ("The School") in an open and fair manner that is known and understood by the public and community members. The purpose of this policy is to emphasize the importance of meeting in an open and accessible manner and identify circumstances in which the Board may meet in a closed session, a meeting that is closed to the public.

The Board shall meet in open session unless one of the exceptions set forth below applies. Each closed session requires a majority roll-call vote of the Board and may be held for one or more of the following specified purposes:

- deliberate a case which was the subject of any hearing before the Board; (19.85(1)(a))
- consider dismissal, demotion, licensing, or discipline of any Board employee or person licensed by the Board, or the investigation of charges against such person, and the taking of formal action on any such matter; (19.85(1)(b))
- consider the employment, promotion, compensation, or performance-evaluation data of any employee; (19.85(1)(c))
- considering strategy for crime detection or prevention; (19.85(1)(d))
- deliberate or negotiate the purchase of public properties, the investment of the corporation's funds, or the conduct of other Board business whenever competitive or bargaining reasons require a closed session; (19.85(1)(e))
- consider financial, medical, social, or personal histories or disciplinary data of specific persons, preliminary consideration of specific personnel problems, or the investigation of charges against specific persons except where par. (b) applies which, if discussed in public, would be likely to have a substantial adverse effect upon the reputation of any person referred to in such histories or data, or involved in such problems or investigations; (19.85(1)(f))
- confer with the Board's legal counsel who is rendering oral or written advice concerning strategy to be adopted by the Board with respect to litigation in which it is or is likely to become involved; (19.85(1)(g))

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- consider requests for confidential, written advice from the ethics board under 19.46(2), Wis. Stats., or from any county or municipal ethics board under 19.59(5), Wis. Stats.; (19.85(1)(h))

Prior to convening a closed session meeting, the Board chair shall announce the nature of the closed session and the specific section of the law that allows for the closed session.

No other business other than that stated in the public notice may be conducted at a closed session. The Board may not reconvene its regular or special meeting after a closed session, within twelve (12) hours, unless public notice of the reconvened meeting was part of the public notice of its regular or special meeting.

In keeping with the confidential nature of closed sessions, no member of the Board shall disclose to anyone the content of discussions that take place during such sessions. The Chair may, in his or her discretion, admit into the closed session an individual who is not a Board Member whose presence the Chair determines is necessary for the consideration of the matter that is subject of the meeting.

Recording of Closed Sessions

Unless required by law, closed sessions of the Board will not be recorded, filmed or photographed without prior approval of the Board.

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EMPLOYMENT

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MANDATORY REPORTING

Adopted ___, 2021

All employees of [NAME] are mandated reporters of suspected child abuse and neglect or belief that abuse or neglect will occur. Therefore, employees are required to report any situations in which they have reason to suspect that a student is being physically abused, emotionally abused, neglected, or sexually abused or neglected as defined by state law. When employees suspect child abuse, they are required to immediately report by telephone to the county Department of Family Services at ____________ or law enforcement of the facts and circumstances contributing to a suspicion of child abuse or neglect or to a belief that abuse or neglect will occur. Following such a report, employees must notify the school social worker. If the school social worker is not available, staff members are required to follow up with the Dean of Students. If the Dean of Students is not available, staff members should follow up with the Principal. In situations in which a Lincoln the School staff member in the chain of child abuse reporting is the person who is suspected of abusing the student, the staff member who suspects abuse should make the report to the next person in the chain of reporting.

All school staff members are mandated to keep confidential any discussions regarding suspected child abuse or neglect; however, the school social worker may share information with staff members on a need-to-know basis for the benefit of the student, keeping in mind the student's right to confidentiality and applicable law.

Once a report of suspected abuse or neglect is made, all staff members are required to cooperate with investigators and are allowed to share basic educational information as well as information related to the original report of suspected abuse or neglect.

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PAID TIME OFF (PTO) AND VACATION

Adopted ___, 2021

[NAME] provides time-off benefits for vacation, sick time, medical appointments, and personal needs for employees and their family members. These benefits are earned based on their length of service. As allowed by law, all leaves of absence and time-off benefits run concurrently and may not be stacked for more time off than allowed under the most generous leave policy applicable to the employee's situation. Once time-off benefits have been exhausted, the remainder of the leave of absence will be unpaid unless otherwise provided in the leave policy.

Paid Time Off (PTO)

Eligibility

PTO is available to all full-time employees. One day of PTO is earned on the first day of the month, up to a maximum accrual of seven (7) days in a given school year. One day of PTO will equal 8 hours of PTO. Part-time employees will receive a prorated amount of PTO each month based on their percentage of time worked as compared to the regular work schedule for comparable full time employees as determined by The School.

New full-time employees begin to earn PTO on the start date of their employment and may begin to use these hours after they successfully complete one month of employment.

Notice

Even though employees may be using PTO for an unplanned absence, they are still expected to provide as much notice as possible to their supervisor according to The School attendance policy. Notice and/or use of PTO hours must be requested/recorded via a Time Off Request within the Skyward system. Employees may take PTO in hourly increments.

PTO Rollover

Unused Paid Time Off hours roll over into Sick Leave hours after June 30 of the current school year. Sick Leave hours can only be used once PTO hours have been exhausted. Sick Leave hours may only be used by employees to receive pay during Family and Medical Leave absences. See Appendix A for more information on Family and Medical Leave.

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Pay
All PTO is paid at employees' regular base rate of pay at the time the days are taken. This does not include overtime, bonuses, or any other special compensation. PTO is designed for employees to use for needs while employed. Unused PTO at the time of termination is forfeited. PTO does not count as time worked for purposes of calculating overtime.

Vacation

[NAME] vacation benefit is designed for time off to rest and relax or to take care of other personal needs. It is based on the employee's job classification.

Eligibility

All full-time, 12-month employees are eligible for paid vacation with The School. The length of vacation is as follows:

Operations - 2 Weeks of Vacation
Administration - 3 Weeks of Vacation

Scheduling

Vacations should be scheduled as far in advance as possible within Skyward with supervisor approval. Vacations must be scheduled during The School's summer break. Every effort will be made to accommodate employees' preference of vacation; however, work demands and business operations may affect the scheduling of vacations. Vacations are not cumulative and may not be carried over from year to year and is forfeited at the end of employment.

Pay

Employees will be paid at their regular rate of pay for each day or week of vacation taken. Vacation pay will be paid on normal payroll periods. Vacation is designed for employees to use for rest periods and other needs while employed.

As allowed by law, all leaves of absence and vacation benefits run concurrently and may not be stacked for more time off than allowed under the most generous leave policy applicable to the employee's situation. Once vacation hours and other time off benefits have been exhausted, the remainder of the leave of absence will be unpaid unless otherwise provided in the leave policy.

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HIRING

Adopted ___, 2021

The Chief Education Officer ("CEO") of [NAME], or the CEO's designee, shall have the authority to create positions, approve job descriptions, and hire, discipline, and terminate employees. [NAME] is an at-will employer.

The CEO or the CEO's designee shall have the authority to determine appropriate processes and procedures for selecting final candidates for positions.

When a final candidate is selected for a position, the candidate will be issued a Letter of Hire that extends the candidate a contingent offer of employment. The offer of employment will be contingent upon (1) the candidate's acceptable completion of a formal background check, and (2) confirmation of the candidate's credentials and education. The CEO or the CEO's designee, shall determine in his/her sole discretion, whether the candidate has satisfied these contingencies and whether the candidate has done so in a timeframe acceptable to the CEO or the CEO's designee.

If the CEO or the CEO's designee determines that either contingency has not been met, the candidate's offer of employment will be rescinded and the candidate will not be hired as an employee.

The CEO or the CEO's designee will determine, in his/her sole discretion, the means by which a formal background check of candidates will be performed and the means by which candidates' credentials and education will be confirmed.

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FAMILY AND MEDICAL LEAVE

Adopted ___, 2021

The School complies with all applicable laws concerning family and medical leave (FMLA). Employees may be eligible for leave under both the federal and state family and medical leave laws. There are different eligibility provisions for these laws, different rights under the laws, and different procedural requirements for employees to follow. The purpose of this policy is to briefly describe some of the rights and responsibilities of employees under these laws. However, this policy does not, nor is it intended to, spell out every right and responsibility under the two laws. If an employee has any questions or desires additional information, the employee should contact the Human Resources Director. When both laws apply, the leaves under state and federal law will run concurrently and the provisions more beneficial to the employee will apply. Medical leaves that qualify under the FMLA will also run concurrently with leaves under short and long term disability policies, worker's compensation, and other laws, as applicable and as allowed by law.

To qualify for federal FMLA leave, employees must be employed by The School for a total of at least twelve (12) months and have actually worked at least 1,250 hours in the preceding 12-month period. To qualify for Wisconsin FMLA, employees must have been employed for more than 52 consecutive weeks and have worked or been paid at least 1,000 hours in the preceding 52 weeks.

Employees on FMLA leave may not engage in any other employment that is inconsistent with the reason for the employee's FMLA leave.

The School will not use the taking of FMLA leave in compliance with the law as a basis for any adverse employment decision. Employees should direct any questions regarding FMLA leave to the Human Resources Director.

GENERAL LEAVE RIGHTS

Federal FMLA

Under the federal FMLA, eligible employees are allowed up to 12 workweeks of unpaid leave per 12-month period for the following reasons (see also Military Family Leave below):

a. The employee's own serious health condition that makes the employee unable to perform the functions of his or her position

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b. To care for the employee's spouse, child or parent with a serious health condition
c. For the birth of the employee's child, or placement of a child for adoption or foster care with the employee
d. For incapacity due to pregnancy, prenatal medical care or child birth

Wisconsin FMLA

The Wisconsin FMLA permits eligible employees to take unpaid leave for the following reasons:

1. 2 weeks for the employee's own serious health condition
2. 2 weeks to care for the employee's spouse, child, domestic partner, parent, parent-in-law, or parent of a domestic partner with a serious health condition
3. 6 weeks to care for the employee's child after birth or adoption

The School will calculate the federal FMLA 12-month period as the calendar year from January 1 to December 31. Under federal FMLA, leave for birth, adoption or foster care placement must be concluded within 12 months of the birth or placement for adoption or foster care. If both parents work for The School, the employees will share one 12 week leave for the birth or placement of a child.

The Wisconsin FMLA entitlement will run on a calendar year basis. Any leave for the birth or adoption of a child taken under Wisconsin FMLA must start within 16 weeks of the birth or adoption of the child.

Military Family Leave

The federal FMLA provides for military family leave. Several provisions of this FMLA policy (including employee notice provisions and certification requirements) apply to military family leave as well.

There are two types of military family leave:

Qualifying Exigency Leave.

Eligible employees with a spouse, son, daughter or parent on covered active duty or called to covered active duty status may use their 12-week FMLA entitlement to address certain qualifying exigencies. Qualifying exigencies may include attending certain military events, arranging for alternative childcare or parental care, addressing certain financial and legal arrangements, attending certain counseling sessions, and attending post-deployment reintegration briefings. The 12 weeks of leave afforded for a qualifying exigency is not in addition to the general 12 weeks afforded under the federal

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FMLA. An employee is entitled to no more than 12 total weeks of leave for any combination of personal, family or qualifying exigency military FMLA.

Servicemember Care Leave.

Eligible employees may also take up to 26 weeks of leave during a single 12-month period to care for an ill or injured service member who is the employee's spouse, parent, child, or "next of kin" who is a covered servicemember. A covered servicemember is a current member of the Armed Forces (including National Guard or Reserves) or a covered veteran who is undergoing medical treatment, recuperation, or therapy (or, for current members, is otherwise in outpatient status or on the temporary disability retired list) for a serious injury or illness. In the case of a current member, a "serious injury or illness" means an injury or illness that was incurred in the line of duty on active duty in the Armed forces or that existed before the beginning of the member's active duty and was aggravated by service in the line of duty on active duty and that may render the servicemember medically unfit to perform his or her duties. In the case of a covered veteran, a "serious injury or illness" is the same as for a current member except that it must also meet any one of the following requirements: it must be (1) an injury that forms the basis for the veteran's enrollment in the VA's program of Comprehensive Assistance for Family Caregivers, (2) a physical or mental condition that substantially impairs the veteran's ability to work because of disability or disabilities related to military service, or would do so absent treatment, (3) a physical or mental condition for which the veteran has received a VASRD of 50 percent or greater, and the need for military caregiver leave is related to that condition; or (4) a continuation of a serious injury or illness that was incurred or aggravated when the veteran was a member of the Armed Forces and rendered the servicemember unable to perform the duties of the servicemember's office, grade, rank, or rating. The 26 weeks of leave afforded for service member care is not in addition to the general 12 weeks afforded under the federal FMLA.

Married Employees

Married employees who both work for The School are limited to no more than an aggregate of 26 weeks of leave between them for military family leave.

School Year Employees

If a school year employee is on leave at the end of one school year and the beginning of another, the leave will be considered consecutive, not intermittent, and the employee will be provided with any benefits over the summer vacation that he/she would normally receive if the employee had been working at the end of the school year. Summer vacation is not counted against a school year employee's FMLA leave entitlement.

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DEFINITIONS OF "CHILD" AND "PARENT"

Under both state and federal FMLA laws, "child" means a biological, adopted or foster child, step child, or legal ward. Under federal FMLA law, "child" also includes a child for whom the employee provides day to day care and financial support. Under both state and federal FMLA laws, a "child" must either be under age 18, or be 18 years or older and unable to care for him/herself because of a mental or physical disability (federal FMLA) or serious health condition (Wisconsin FMLA). Under both state and federal laws, "parent" means biological parent, foster parent, adoptive parent, or step parent. Under federal FMLA law, "parent" includes an individual who was responsible for the day-to-day care and financial support of the employee when the employee was a child, but does not include parents of an employee's spouse or domestic partner. Under state FMLA law, "parent" includes parents of an employee's spouse or domestic partner.

SERIOUS HEALTH CONDITION

A serious health condition is an injury, illness, impairment or physical or mental condition that involves:

1. Inpatient care in a medical care facility; or
2. Continuing treatment by a health care provider for a condition that either prevents the employee from performing the functions of the employee's job or prevents a qualified family member from participating in school or other daily activities. Continuing treatment by a health care provider includes:

    a) A period of incapacity of more than three (3) consecutive full calendar days combined with at least two (2) visits to a health care provider or one (1) visit and a regimen of continuing treatment under the supervision of a health care provider (time limits apply to health care provider visits) (Under the Wisconsin FMLA, the requirement for more than three (3) consecutive calendar days of incapacity does not apply.);

    b) Any period of incapacity due to pregnancy or prenatal care;

    c) Any period of incapacity or treatment for such incapacity due to a chronic serious health condition;

    d) A period of incapacity which is permanent or long-term due to a condition for which treatment may not be effective; or

    e) Any period of absence to receive multiple treatments by a health care provider or for a condition that would likely result in a period of

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incapacity of more than three (3) consecutive calendar days in the absence of medical intervention or treatment.

NOTIFICATION AND CERTIFICATION

Whenever possible, employees must give at least 30 days' written notice of the need for FMLA leave. When 30 days' notice is not possible, employees are expected to give as much written notice as is practical. Please see the Human Resources Director for FMLA request forms. Normal call-in procedures must also be followed for all FMLA absences. If an employee does not expressly request family or medical leave, but requests leave for a reason that might qualify as family or medical leave, The School may provide the employee with a leave request form to fill out and return to the Human Resources Director as soon as possible in order to determine whether the leave requested qualifies as FMLA leave. The School may temporarily designate the leave as FMLA leave.

When requesting FMLA, employees must give sufficient information to determine if the leave may qualify for FMLA protection and the anticipated timing and duration of the leave. Sufficient information may include that the employee is unable to perform job functions, a family member is unable to perform daily activities, the need for hospitalization or continuing treatment by a health care provider, or circumstances supporting the need for military family leave. Employees must also inform The School if the requested leave is for a reason for which FMLA leave was previously taken or certified.

The School may require an employee who is requesting FMLA leave to provide medical certification for the leave. Employees will have 15 days in which to provide the completed certification, except in extenuating circumstances. If an employee fails to provide adequate certification in a timely manner, the employee's leave request or continuation of leave may be delayed or denied altogether. The School may directly contact the employee's health care provider for authentication or clarification purposes using a health care professional, an HR professional, leave administrator or management official. The School may also require clarification of an incomplete or insufficient certification. Before The School makes direct contact with the health care provider, the employee will be given an opportunity to resolve any deficiencies in the medical certification as required by law.

The School may require a second medical opinion at its expense regarding a serious health condition from a health care provider of its choice. If the first two opinions differ, The School may obtain a third opinion at its expense from a mutually agreed upon health care provider. The third opinion shall be binding on the parties. The School may deny FMLA leave to an employee who refuses to release relevant medical records to the health care provider designated to provide a second or third opinion. The employee will be provisionally entitled to leave and benefits under the FMLA pending the second

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and/or third opinion. Recertification and periodic reports regarding the employee's status and intent to return to work may also be required as allowed by law.

The School will inform employees who have requested leave whether they are eligible for leave, specify any additional information needed, and inform the employee of his/her rights and responsibilities. If the employee is not eligible for leave, The School will provide a reason for the ineligibility. The School will also inform eligible employees whether requested leave will or will not be designated as FMLA leave and the amount of leave that will be counted against the employee's leave entitlement.

Recertification

The School may request recertification for the serious health condition of the employee or the employee's family member as allowed by law. In seeking recertification, The School may provide the employee's health care provider with the employee's attendance records and to confirm whether the employee's absences are consistent with the employee's serious health condition.

INTERMITTENT LEAVE

An employee may take any leave covered by Wisconsin FMLA as intermittent leave, provided the employee provides notice as required by the law. The last increment of intermittent leave for the birth or adoption of a child under Wisconsin FMLA must begin within 16 weeks after the birth or placement for adoption of the child.

For leaves covered only by federal FMLA, an employee may take "intermittent" or "reduced schedule" leave, if medically necessary, for the employee's own serious health condition, to care for a spouse, parent, son, or daughter with a serious health condition, and to care for a covered servicemember with a serious injury or illness. Employees must make reasonable efforts to schedule leave for planned medical treatment so as to not unduly disrupt The School's operations. To the extent an employee has control, medical appointments and treatments related to a serious health condition should be scheduled outside of working hours or at such times that allow for a minimal amount of time away from work. For medically necessary intermittent or reduced schedule leave that is foreseeable based on planned medical treatment for the employee, a family member, or a covered servicemember, The School may temporarily transfer an employee taking such leave to a position with equivalent pay and benefits if the new position better accommodates the leave. Military leave due to qualifying exigencies may also be taken on an intermittent basis. Employees may also take intermittent FMLA leave for the birth, adoption or foster placement of a child during the federal-only portion of their FMLA leave.

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In addition, special rules apply to intermittent leave for "instructional" employees under the federal FMLA. The special rules apply to intermittent or reduced schedule leave, or leave near the end of a semester. "Instructional employees" are employees whose principal function is to teach students in a class, small group, or individual setting, and includes athletic coaches, driving instructors, and special education assistants such as signers for the hearing impaired. It does not include assistants or aides who do not actually teach nor does it include auxiliary personnel such as counselors, psychologists, or curriculum specialists, or non-instructional support staff. The special rules for "instructional" employees include:

1. If an eligible employee needs intermittent leave or leave on a reduced leave schedule to care for a family member with a serious health condition, to care for a covered servicemember, or because of the employee's own serious health condition, which is foreseeable based on planned medical treatment, and the employee will be on leave for more than 20 percent of the total number of working days over the period the leave would extend, in order to minimize the disruption to the educational process, The School may require the employee to choose either to:

   a. take leave for a particular duration, not longer than the duration of the planned treatment. If the employee chooses this option, the entire amount of leave will be counted against his/her FMLA leave entitlement; or
   b. transfer temporarily to an available alternative position, for which he/she is qualified, which has equivalent pay and benefits and which better accommodates recurring periods of leave.

2. If the employee does not give required notice of foreseeable leave to be taken intermittently or reduced leave schedule, The School may require the employee to take leave of a particular duration, or to transfer temporarily to an alternative position, or delay the taking of leave until the employee has given the necessary notice.

3. If the employee begins a leave more than five weeks before the end of a semester, less than five weeks before the end of a semester, and less than three weeks before the end of a semester, special rules apply:

   a. If the employee begins leave more than five weeks before the end of a semester, the leave will last at least three weeks, and the employee would return to work during the three-week period before the end of the semester. The School may require the employee to continue taking leave until the end of the semester.

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b. If the employee begins leave during the five-week period before the end of a semester because of the birth of a son or daughter; the placement of a son or daughter for adoption or foster care; to care for a spouse, son, daughter, or parent with a serious health condition; or to care for a covered servicemember, The School may require the employee to continue taking leave until the end of the semester if the leave will last more than two weeks, and the employee would return to work during the two-week period before the end of the semester.

c. If the employee begins leave during the three-week period before the end of a semester because of the birth of a son or daughter; the placement of a son or daughter for adoption or foster care; to care for a spouse, son, daughter, or parent with a serious health condition; or to care for a covered servicemember, The School may require the employee to continue taking leave until the end of the semester if the leave will last more than five working days.

d. If The School requires the employee to continue taking leave to the end of the semester, only the period of leave until the employee is ready and able to return to work will be charged against the employee's FMLA leave entitlement. However, The School will maintain the employee's group health insurance and restore the employee to the same or equivalent job including other benefits at the conclusion of the leave.

SUBSTITUTING PAID TIME OFF

Use Of Paid Leave

FMLA leave is unpaid leave. However, employees have the right or employers may require in certain cases, that the employee use accrued paid leave during FMLA leave. During any portion of leave covered by the WFMLA, the employee may elect to or not to use paid leave. When paid benefits are substituted for the otherwise unpaid time, the employee is using the benefits concurrently with FMLA leave, and those benefits will not be available to the employee later. When paid benefits are substituted, the employee may be required to satisfy any procedural requirements of The School's paid leave policy (for example, advance notice to use paid leave, use of paid leave in established increments, etc.). If an employee does not meet qualifications to use paid leave, that will not affect the employee's ability to use FMLA leave if the leave qualifies as FMLA leave.

During any portion of leave that is covered by the federal FMLA only, The School may restrict the use of paid time as allowed by law.

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In cases where substitution of a paid benefit is not possible, the employee will generally receive reduced compensation consistent with the number of hours the person actually works.

BENEFITS DURING LEAVE

An employee's coverage under group health plans (i.e., group health and dental coverage) will be maintained during the period of an FMLA leave as required by the Wisconsin and federal FMLA laws and in accordance with the applicable terms of the plans.

Employees who normally pay a portion of the premium for insurance coverage must continue to do so during the period of FMLA leave. If paid leave is substituted for unpaid leave, the employee's portion of the premium will be deducted from the employee's paycheck. For those employees on unpaid leave, payment arrangements must be made prior to the start of the leave, or as soon as practicable. A 30-day grace period will apply to premium payments. If payment is not made within the grace period, the employee's group health/dental insurance may be terminated retroactive to the date coverage was last paid for. The School will provide 15 days' notification prior to the employee's loss of coverage.

If The School maintains an employee's insurance during an FMLA leave, and the employee does not return from FMLA leave, under certain circumstances The School will have the right to recover the total cost of the insurance premiums paid during the employee's leave, as allowed by law.

Benefit Accruals

If an employee substitutes accrued paid leave for unpaid FMLA leave in order to remain fully compensated, the employee will continue to accrue paid time off at the rate at which the employee accrued such time prior to leave. If the leave is partially paid, the employee will accrue paid time off at a prorated rate. Once the employee stops receiving pay, the employee will no longer accrue paid time off during an FMLA leave. Use of FMLA cannot result in the loss of any employment benefit that accrued prior to the start of the employee's leave. Other benefit accruals may be suspended during the period of the leave and will resume upon return to active employment. An employee should check with the Human Resources Director regarding other benefit continuation provisions.

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Worker's Compensation Absences

When an employee is absent due to a work-related illness or injury which meets the definition of a serious health condition, the absence will be counted against the employee's allotment of FMLA leave under federal law. In other words, the employee is using federal FMLA leave concurrently with the worker's compensation absence.

Early Return From Leave

An employee who wishes to return to work earlier than originally anticipated should provide at least two days' notice of such request. A fitness for duty certification may be required.

RETURNING TO WORK AT THE END OF LEAVE

Employees who return to work from FMLA leave within the timeframes protected by the FMLA laws will be returned to their former position or, if that position is no longer available, an equivalent position with equivalent pay, benefits and other employment terms. If an employee wishes to return to work before his/her leave is to end, and work is available, the employee must notify the Human Resources Director at least 2 days prior to the desired return date. If an employee took FMLA leave for his/her own serious health condition, a fitness for duty certification will be required before the employee may return to work. In such cases, an employee's return will be delayed until such a certification is received.

FAILURE TO RETURN TO WORK AT END OF FMLA-PROTECTED LEAVE

If an employee fails to return to work after the expiration of an FMLA-protected leave, the employee's rights under state and federal FMLA laws will no longer be in effect and the employee will be subject to immediate termination. If the employee's inability to return to work is due to the continuation, recurrence or onset of the employee's own serious health condition, or of the serious health condition of the employee's spouse, child or parent, The School will consider a request for a further unpaid leave. However, the employee must submit a written request for consideration of a further leave as soon as the employee realizes that he/she will not be able to return at the expiration of the FMLA-protected leave period. The School will consider each such request on a case by case basis. There is no guarantee that a further leave will be granted.

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FAILURE TO MEET POLICY REQUIREMENTS

If the employee fails to meet the requirements of this policy for family or medical leave, the request for leave will be denied until the requirements are met.

Extension of Leave

You may submit requests for additional unpaid extensions of leave to the Human Resources Director. The School reserves the right to accept or deny these requests as well as the right to request a doctor's certificate prior to granting any extension.

"Key Employees"

Certain "key employees" as defined by law may not be eligible for reinstatement to their jobs or equivalent positions following a leave if reinstatement would cause The School hardship.

BONE MARROW OR ORGAN DONOR LEAVE POLICY

Employees who have worked for The School for more than 52 consecutive weeks and worked at least 1,000 hours during the preceding 52 weeks are eligible for leave to be a bone marrow or organ donor. The employee may take up to six weeks of leave in a 12-month period for the purpose of serving as a bone marrow or organ donor if the employee provides The School with written certification that: (1) the donee has a serious health condition that necessitates a bone marrow or organ transplant; (2) the employee is eligible and has agreed to be a bone marrow or organ donor for the donee; and (3) the amount of time expected to be necessary for the employee to recover from the donation procedure.

The employee must give notice of the need for leave in a reasonable and practicable manner and must schedule the donation procedure so that it does not unduly disrupt The School's operations, subject to the donee's health care provider's approval.

Leave under this policy is unpaid, but employees may substitute paid or unpaid time of any other type provided by The School. Employee benefits, including group health insurance coverage, will be maintained as they would be in the event of a leave under the Wisconsin Family and Medical Leave Act. Taking leave under this policy will not entitle an employee to a right, employment benefit, or position to which the employee would not have been entitled had he/she not taken the leave, including accrual of seniority. Employees returning from a leave under this policy will be returned to their position, if vacant. If their position is no longer vacant, they will be returned to a position having equivalent compensation, benefits, working shift, hours of employment, and other terms and conditions of employment.

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EMPLOYEE/STUDENT RELATIONSHIPS

Adopted ___, 2021

All The School employees shall recognize and respect the rights of students, as established by local, state, federal law, and by The School policies. As such, employees must, at all times, maintain a professional relationship and exhibit a professional demeanor in their interactions with students. Furthermore, employees shall refrain from engaging in any verbal or physical conduct of a sexual nature directed toward a student, including, but not limited to, sexual advances, activities involving sexual innuendo, or requests for sexual favors or sexually-explicit language or conversation. Employees shall not form inappropriate social or romantic relationships with students, regardless of whether or not the student is 18 years old. Employees are also prohibited from using their employment positions to foster inappropriate relationships with students with the intent of forming a sexual relationship with students upon graduation; this inappropriate conduct is also known as “grooming.”

To eliminate even the appearance of inappropriate relationships, employees must maintain the highest ethical standards in their interactions with students both during and outside of the work day. To that end, employees are prohibited from interacting with students through social media, except through official The School social media platforms as approved by the Administration. Further, employees should not interact with parents of The School students through social media, except through official The School social media platforms.

Employees are also prohibited from interacting with students through texting, electronic messaging services, or personal email accounts. Interactions with students outside of the work day that are necessary for the performance of employees’ job duties should only be through official The School email addresses.

Finally, employees must not use profane or obscene language or gestures in the workplace, whether or not students are present.

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REIMBURSEMENT FOR BUSINESS-RELATED TRAVEL

Adopted ___, 2021

Travelers incurring expenses for business travel while performing duties on behalf of the Governance Board ("Board") shall be reimbursed by the Board for lodging costs, meals, and mileage as provided by this policy. Travelers are expected to exercise reasonable care in order to incur only such expenses as are prudent in order to meet the traveler's schedule and business needs. The traveler shall not be reimbursed for expenses that are unauthorized or unreasonable, such as, among others, intoxicating beverages, recreation, fines for parking or moving violations, and expenses incurred by the traveler's family or other guests. Any amount that the traveler receives from the Board in excess of actual expenses incurred by the traveler must be returned to the Board within 120 days of the traveler's receipt of such an amount from the Board.

Travel reimbursement that is provided from federal funds must be reasonable and consistent with this policy and any corresponding procedures. Additionally, any such reimbursement shall be consistent with any additional cost allowability policies and procedures established by the Board in order to comply with federal law regarding the use of federal funds.

Overnight Travel Expenses

For all overnight travel, except for certain travel to educational conferences, the Board will reimburse travelers for their actual incurred lodging expenses up to 150% of the applicable nightly lodging rate for the destination city as established by the US Government General Services Administration ("GSA") for domestic lodging and the U.S. Department of State for international lodging. In situations where a traveler's overnight lodging expenses exceed this amount, the traveler must obtain preapproval from the Board or the traveler's expenses will only be reimbursed up to a maximum of 150% of the amount established by the GSA for domestic lodging and the U.S. Department of State website for international lodging.

For overnight travel to educational conferences, the lodging rate limit above does not apply where the traveler is paying a prenegotiated rate offered by the conference. In cases where the educational conference facilities are completely booked, travelers should obtain lodging based on the nonconference overnight travel policy established above.

Meals and Incidental Expenses ("M&IE") for overnight travel will be reimbursed up to the per diem rate specific to the destination city as established by the GSA for domestic travel or the U.S. Department of State for international travel. Travelers will not be reimbursed for M&IE in excess of the applicable per diem rate.

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To be eligible for reimbursement for overnight lodging and M&IE expenses, the traveler must provide information regarding the amount paid, the date paid, the destination traveled to, the place of lodging or a description of the type of expense incurred, and the purpose for the travel and expense.

Mileage Expenses

The Board shall reimburse mileage expenses incurred by travelers for business purposes at the standard federal IRS mileage rate for business use of an automobile. The amount of this reimbursement shall be based on the traveler's driving distance by means of the most direct route to the destination as determined by Google Maps. All mileage reimbursement requests shall include the date, destination, reason for travel, and mileage.

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STUDENT

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PRIVACY IN LOCKER ROOMS

Adopted ___, 2021

The _______________ ("School") shall observe measures intended to protect the privacy rights of individuals using school locker rooms. The following provisions outline the extent to which that protection can and will be provided:

1. Locker rooms are provided for the use of physical education students, athletes and other activity groups and individuals authorized by the building principal or by The School policy. No one will be permitted to enter into the locker room or remain in the locker room to interview or seek information from an individual in the locker room at any time. Such interviews may take place outside of the locker room consistent with applicable The School policies and/or school rules.

2. No cameras, video recorders or other devices that can be used to record or transfer images may be used in the locker room at any time.

3. No person may use a cell phone to capture, record or transfer a representation of a nude or partially nude person in the locker room or to take any other photo or video image of a person in the locker room.

Students and staff violating this policy shall be subject to school disciplinary action and possible legal referral, if applicable. Other persons violating the policy may be subject to penalties outlined in state law. The _____________ shall be responsible for enforcing this policy.

This policy shall be publicized annually and posted in each locker room in The School.

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BULLYING

Adopted ____, 2021

Introduction

The ____________________ School strives to provide a safe, secure, and respectful learning environment for all students in school buildings, on school grounds, and school buses and at school-sponsored activities. Bullying has a harmful social, physical, psychological, and academic impact on bullies, victims, and bystanders**.** The school district consistently and vigorously addresses bullying so that there is no disruption to the learning environment and learning process.

Definition

Bullying is deliberate or intentional behavior using words or actions, intended to cause fear, intimidation, or harm. Bullying may be repeated behavior and involves an imbalance of power**.** The behavior may be motivated by an actual or perceived distinguishing characteristic, such as, but not limited to: age; national origin; race; ethnicity; religion; gender; gender identity; sexual orientation; physical attributes; physical or mental ability or disability; and social, economic, or family status.

Bullying behavior can be:

1. Physical (e.g. assault, hitting or punching, kicking, theft, threatening behavior)
2. Verbal (e.g. threatening or intimidating language, teasing or name-calling, racist remarks)
3. Indirect (e.g. spreading cruel rumors, intimidation through gestures, social exclusion, and sending insulting messages or pictures by mobile phone or using the internet – also known as cyber bullying)

Prohibition

Bullying behavior is prohibited in all schools, buildings, property, and educational environments, including any property or vehicle owned, leased, or used by the school district. This includes public transportation regularly used by students to go to and from school. Educational environments include, but are not limited to, every activity under school supervision.

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Procedure for Reporting/Retaliation

All school staff members and school officials who observe or become aware of acts of bullying are required to report these acts to ________________________ (a school staff member or administrator designated by the Board to be a recipient of such reports.) Any other person, including a student who is either a victim of the bullying or is aware of the bullying or any other concerned individual is encouraged to report the conduct to _________________________ (a school staff member or administrator designated by the Board to be a recipient of such reports.)

Reports of bullying may be made verbally or in writing and may be made confidentially. All such reports, whether verbal or in writing, will be taken seriously and a clear account of the incident is to be documented. A written record of the report, including all pertinent details, will be made by the recipient of the report.

The school official receiving a report of bullying shall immediately notify the school district employee assigned to investigate the report. The following school district employees have been identified as the investigator: (a list that contains the names of district employees and schools who have the responsibility to receive the information and conduct the investigation.)

There shall be no retaliation against individuals making such reports. Individuals engaging in retaliatory behavior will be subject to disciplinary action.

Procedure for Investigating Reports of Bullying

The person assigned by the district to conduct an investigation of the bullying report shall, within one school day, interview the person(s) who are the victim(s) of the bullying and collect whatever other information is necessary to determine the facts and the seriousness of the report.

Parents and/or guardians of each pupil involved in the bullying will be notified prior to the conclusion of the investigation. The district shall maintain the confidentiality of the report and any related pupil records to the extent required by law.

Sanctions and Supports

If it is determined that students participated in bullying behavior or retaliated against anyone due to the reporting of bullying behavior, the school district administration and school board may take disciplinary action, including: suspension, expulsion, and/or referral to law enforcement officials for possible legal action as appropriate. Pupil services staff will provide support for the identified victim(s).

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Disclosure and Public Reporting

The policy will be distributed annually to all students enrolled in the school district, their parents and/or guardians and employees. It will also be distributed to organizations in the community having cooperative agreements with the schools. The school district will also provide a copy of the policy to any person who requests it.

Records will be maintained on the number and types of reports made, and sanctions imposed for incidents found to be in violation of the bullying policy.

An annual summary report shall be prepared and presented to the school board, which includes trends in bullying behavior and recommendations on how to further reduce bullying behavior. The annual report will be available to the public.

Source: DPI Model Bullying Policy

This resource was developed by WRCCS at CESA 9 between 2018-2023 with funding from Wisconsin's federal Charter Schools Program grant from the U.S. Department of Education. See wrccs.org for more information.

STUDENT RECORDS

Adopted ___, 2021

"Student records" are defined as all records relating to individual students maintained by [NAME] ("The School").

Student records do not include the following:

(1) Notes or records maintained for personal use by a teacher or other person who is required to hold a certificate, license, or permit if such records and notes are not available to others;
(2) Records necessary for, and available only to persons involved in, the psychological treatment of a student;
(3) Records created and maintained by a law enforcement unit for a law enforcement purpose;
(4) Records on a student who is 18 years of age or older that are made or maintained by a physician, psychiatrist, psychologist, or other recognized professional or paraprofessional acting in his or her professional capacity or assisting in a paraprofessional capacity, made, maintained or used only in connection with the treatment of the student, and disclosed only to individuals providing the treatment; and
(5) Records created or received by The School after an individual is no longer a student in attendance and that are not directly related to the individual's attendance as a student.

The School recognizes the need for confidentiality of student records and shall maintain the confidentiality of student records at collection, storage, disclosure, and destruction in accordance with the Family Educational Rights and Privacy Act and applicable state law. Student records shall be available for inspection or release only with notification or prior written approval of the parent or adult student, except in situations where legal requirements require or allow release of records without such notification or prior approval.

The School will comply with a request by a parent, guardian, or adult student for access to a student's records within a reasonable period of time but not more than forty-five (45) days after receiving the request. Upon request, The School shall provide a parent, guardian, or adult student with a copy of a student's records and/or an opportunity to review the student's records with an individual qualified to explain and interpret the records.

The School shall maintain a record of each request for access and each disclosure of student records which includes the identity of the party viewing the record and the legitimate interest the party had in viewing the record.

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DIRECTORY INFORMATION

The School shall provide public notice to students and their parents or guardians of The School's intent to make available, upon request, certain information known as "directory information." "Directory information" is defined as information contained in student records that would not generally be considered harmful or an invasion of privacy if disclosed.

Directory information includes: a student's name, address, telephone number, email address, date and place of birth, photograph, participation in officially recognized activities and sports, height and weight, if a member of an athletic team, dates of attendance, date of graduation, name of the school most recently previously attended by the student, and degrees and awards received.

Directory data shall not be released for commercial or promotional purposes.

Parents and adult students may opt out of The School's disclosure of directory information upon written notification to The School within fourteen (14) days after receipt of The School's notice of intent to disclose directory information.

TRANSFER OF RECORDS

The School shall transfer all student records relating to a student upon receipt of a written notice from the parent or guardian of a student or an adult student that the student intends to enroll in another school or school district, written notice from the other school or school district that the student has enrolled, or notice from a court that the student has been placed in a juvenile correctional facility or a secured residential care center for children and youth.

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WELLNESS

Adopted ___, 2021

This Wellness Plan outlines The School's approach to ensuring appropriate environments and purposeful opportunities for students to learn about and practice healthy eating and to engage in physical activity.

I. Designated Wellness Plan Leadership

The following individuals at The School have primary responsibility for The School's implementation and oversight of The School's Wellness Plan:

[List the applicable position(s)]

A. Wellness Plan Goals

To promote the health and well-being of The School students, The School has adopted the following school wellness goals:

1. Physical Activity Goals. The physical activity goals within this Wellness Plan are intended to help students develop their knowledge, experience, and interest in specific physical activities and to obtain and appreciate the short-term and long-term benefits of personal fitness. The goals listed below, which focus on students directly engaging in physical movement and exercise, will support and supplement The School's comprehensive physical education curriculum.

[Insert a list of one or more physical activity goals.]

2. Nutrition Education Goals. The nutrition education goals established within this Wellness Plan are intended to support and supplement state-mandated curricular elements that relate to health and nutrition, for the purpose of providing students with the knowledge and skills necessary to appreciate the benefits of and make sound decisions related to eating habits and nutrition.

[Insert a list of one or more nutrition education goals.]

3. Nutrition Promotion Goals. By establishing nutrition promotion goals, The School intends to provide resources and opportunities for students, staff, and others that will help students to recognize,

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develop, and practice healthy eating habits within the school environment, at home, and/or in other community settings.

[Insert a list of one or more nutrition promotion goals.]

4. Goals for Other School-Based Activities that Promote Student Wellness. By establishing goals for other school-based activities that promote student wellness within this Wellness Plan, The School attempts to recognize that wellness initiatives can be integrated across a variety of school-related settings and can extend beyond the school food service venues and the facilities that are specifically intended for engaging in physical activity. In addition, it is possible to promote student wellness through programs that facilitate parent/family engagement or that involve partnerships or coordination with other public and private entities.

[Insert a list of one or more goals for other school-based activities that promote student wellness.]

B. Standards and Nutrition Guidelines for Foods and Beverages Available to Students

1. Foods Sold to Students at School. The following nutrition standards and guidelines apply to foods and beverages offered for sale to students on school premises before the start of the school day, during the official school day, and within 30 minutes after the official school day:

a) Reimbursable meals offered in any federally-subsidized school meal program shall meet the statutory and regulatory nutrition standards established for such meals.

b) Foods and beverages sold to students outside of the school meal programs shall meet at least the USDA's minimum nutrition standards for such items (also called the "smart snacks" or "competitive food" standards), including all permissible exemptions and exceptions that are identified in the regulations or otherwise expressly allowed by the USDA. These standards apply, for example, to a la carte options in cafeterias, vending machines that are accessible to students, and items sold in school stores or on snack carts.

c) Both the federal standards and this Wellness Plan allow a building principal, or another administrative-level designee,

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to approve (to the extent authorized by the Department of Public Instruction) a limited number of exempt student organization fundraisers involving the sale of food or beverage items that do not meet any minimum nutrition standards. DPI currently allows up to two (2) approved exempt fundraisers per student organization per school year, with each such fundraiser lasting no longer than two (2) weeks. However, an approved exempt fundraiser may not take place in the food service area during any school meal period. In addition, an authorized exempt fundraiser must adhere to all other The School policies and procedures related to fundraisers.

d) Foods that, with appropriate The School approval, are ordered and delivered at school or through a school-related activity, but that are not intended to be (and that due to packaging, preparation requirements, etc., cannot reasonably be) consumed on school premises (such as a frozen pizza fundraiser) are not subject to any specific nutrition standards or time or location restrictions regarding orders or deliveries under this local Wellness Plan.

2. Foods Provided or Distributed, but Not Sold, to Students. The following standards and guidelines apply to foods and beverages that are provided or distributed (but not sold) to students on school premises before the start of the school day, during the official school day, and within 30 minutes after the official school day:

- Beverages – Any beverages that are not on the approved list of beverages to be sold on the school campus during the school day should not be served or distributed to students during the school day without first receiving written permission from the *[identify the appropriate staff position – e.g., building principal]*. All schools must also be aware of and adhere to federal requirements regarding the availability of free drinking water for students.

- Classroom Celebrations, Receptions for Special Events, and Similar Special Occasions – Teachers and students are encouraged to offer or distribute healthy snacks and treats for student birthday celebrations, classroom parties, and other similar events. A healthy snack list that is based on sound nutrition facts and principles will be developed and maintained under the coordination of the *[identify the*

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designated position] and made available to staff and parents. This list may include, but is not limited to, items such as the following:

Fresh fruit or fruit cups
Fresh vegetables and low-fat dip
Dried fruits
String cheese/cheese cubes
Whole grain crackers
Other low-fat crackers
Trail/cereal mixes (no candy included)
Yogurt
Pretzels
Popcorn
Low-fat muffins

During occasional celebrations (birthday observances, classroom parties, etc.) items of minimal nutritional value that do not meet the federal nutrition standards for "competitive food" sold to students and that also would not qualify as a healthy snack option as defined by The School standards may, in moderation, be served or distributed to students unless otherwise restricted by a directive of the building principal. However, unless the building principal or his/her administrative designee approves an exception, whenever school staff are involved in organizing such an occasional celebration (for a class or club party, a brief reception following an intra-day performance, etc.), staff shall ensure that one or more healthy alternatives are offered in conjunction with any items of minimal nutritional value that may be offered. Whenever a student's parent or guardian is primarily responsible for initiating such an occasional celebration, the schools shall encourage parents and guardians to provide a healthy snack item to be offered in conjunction with any offering of minimal nutritional value.

Staff members are strongly encouraged to schedule occasional celebrations and other events where food is served or distributed to occur after the students' scheduled lunch period.

As needed and while maintaining an appropriate degree of confidentiality, staff will also make parents, guardians and

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students aware of restricted foods to be avoided as a means of accommodating any identified food allergies or similar dietary restriction within the relevant class or other student group.

- Teacher-Initiated Rewards or Learning Incentives – Staff's use of foods of minimal nutritional value as student rewards or learning incentives should be kept to a minimum (e.g., not regularly and using minimal serving sizes). Healthy food choices or non-food items are preferred. Should teachers or other staff members feel compelled to utilize food items as an incentive, they are strongly encouraged to select an option from The School's list of healthy snack options for foods served or distributed during the school day, as outlined above.

- Other Meetings and Events – At any other school-sponsored meeting/event that occurs before, during, or up to 30 minutes after a school day, that involves student participation, and that has not otherwise been addressed in this section of the Wellness Plan, any food or beverage that is provided by The School and served to the attendees shall either (1) adhere to The School's nutrition guidelines for food and beverages sold on school campus during the school day, as identified above; or (2) adhere to The School's list of healthy snack options for items served or distributed to students during the school day, as mentioned above. The building principal or his/her administrative-level designee may, at his/her discretion, approve an exception to this restriction if requested and approved in advance of the event.

- Food an Individual Student Brings from Home – Nothing in this Wellness Plan attempts to create or modify any The School rules for the foods and beverages that a student brings to school for his/her own consumption.

C. Marketing of Food and Beverages.

No The School official, employee, or agent shall prospectively authorize or allow the marketing of any foods or beverages on a school campus during the school day (including before school and 30 minutes after the close of the instructional day for students) that do not meet the minimum federal nutritional standards for foods and beverages that are sold to students

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outside of the school meal programs. “School campus” means any area of The School property that is accessible to students during the school day. “Marketing” means advertising and other promotions, and can include oral, written, or graphic statements/materials that are presented with the purpose of encouraging the sale or consumption of a particular product. Examples of items on which marketing may sometimes be proposed include the exterior of vending machines, trash cans, cups, tray liners, posters, etc.

The prohibition on the marketing of certain foods and beverages established in the previous paragraph is clarified and limited as follows:

- The limitations on food and beverage marketing do not apply to events or activities that occur on non-school days or more than 30 minutes after the end of the official school day for students.
- The limitations do not apply to materials used for educational purposes in the classroom.
- The prospective aspect of the limitations means, for example, that any stock-on-hand of non-compliant materials may be exhausted and that any non-compliant durable equipment (such as a menu board or a scoreboard in a gymnasium) can continue to be used until it is replaced.
- The limitations do not categorically prohibit the display or presentation of marketing materials that identify a general brand that is widely associated with specific products that are considered healthy and other specific products that would be considered unhealthy (i.e., that would not meet the minimum federal standards for “competitive food” sold in schools). However, the degree to which a general brand may be more strongly associated with unhealthy products should be considered in evaluating any specific marketing-related proposal.
- Because the minimum federal nutritional standards for foods and beverages that are sold to students at school and outside of the school meal programs include a provision allowing a limited number of approved, exempt fundraisers, the marketing limitations do not apply to materials that relate to such fundraisers.
- Although students and staff remain subject to any other applicable The School rules, the marketing limitations in this Wellness Plan are not intended to be enforced with respect to personal items,

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such as clothing worn by a student, a lunch bag, a water bottle or thermos, or the packaging on items that are brought from home for personal consumption.

D. Stakeholder Involvement

Schools are required to provide opportunities for school administrators, teachers (including physical education and health education teachers), school food service staff, school health professionals (e.g., a registered nurse serving the schools), students, parents and guardians, Board members, and other interested members of the community to participate in the development, implementation, and periodic review and updating of The School's Wellness Plan.

The manner in which such opportunities will be provided will include, but are not necessarily limited to the following:

o <u>Wellness Steering Committee</u>.

The Wellness Steering Committee is a formal committee that shall consist of not more than 13 members and that shall be chaired by the *<u>[insert the position title of the primary The School wellness policy leader]</u>*. The committee's primary charge is to be involved in the periodic assessment, review, and updating of this Wellness Plan, with a particular emphasis on recommending steps to improve The School's knowledge of and compliance with the Plan and on recommending possible changes to the Plan (e.g., new or revised goals). The chairperson:

- Shall have the power to identify and recommend individuals to be appointed as formal members of the committee, including filling vacancies, while giving due attention to representation among the specific stakeholder groups identified in applicable federal regulations. However, not every stakeholder group must be represented at all times—particularly when there is a lack of interest. The appointment of any The School employee to the committee shall be subject to the approval of the employee's supervisor, the appointment of any Board member to the committee shall be made directly by the Board, and all other recommendations for committee membership shall be approved by the _______. Any student appointee(s) shall be at least in 7th grade. An appointment may be for a defined term, or if no specific term is designated at the time of

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appointment, then the appointment shall be considered ongoing until the committee member is removed (including being replaced to accommodate additional interest in serving) or resigns. Employees serving on the committee in their official capacity may resign their committee membership only with supervisory approval.

- Shall maintain a list of current and historical committee members for at least the period required by the Wisconsin public records law.

- May recommend the removal of any currently-serving committee member to the __________, who shall either approve or reject the recommendation. However, only the Board may approve the removal of a Board representative when the Board member in question is still actively serving on the Board.

- Shall convene the committee as needed on dates established by the committee or chosen by the chair.

- Shall ensure that the meetings of the Wellness Steering Committee are noticed in compliance with the Open Meetings Law.

- May determine the extent to which minority positions or multiple options may be presented to The School officials for further consideration in situations where there is a disagreement or lack of sufficient consensus among the committee members in regard to particular issues.

o Meetings Designed as Stakeholder Awareness and Input Sessions.

The *[insert the position title of the primary The School wellness policy leader]* will periodically hold, attend, and/or help organize meetings for the purpose of gathering input related to this Wellness Plan and its implementation.

o Goal-Driven Events and Activities.

In formulating and implementing action steps related to the goals identified in this Wellness Plan, The School personnel will attempt to identify specific opportunities for stakeholder input and

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participation.

E. Assessing the Wellness Plan and Its Implementation

The primary means of measuring the implementation of and schools' compliance with this Wellness Plan is through a formal assessment that will occur at least once every three (3) years. Such assessments shall be completed under the direction of the *[insert the position title of the primary wellness policy leader]* and shall be in line with federal requirements and any applicable requirements of the Department of Public Instruction (DPI). For purposes of carrying out triennial assessment requirements, The School shall do all of the following:

1. Complete the Wellness School Assessment Tool (WellSAT) to evaluate how the Wellness Plan compares to model policy language and best practices for school wellness.

2. Complete the DPI-required Local Wellness Policy Report Card, which addresses: (a) the extent to which The School's schools are in compliance with The School Wellness Plan; (b) the progress made in attaining the goals of the Wellness Plan; and, (c) the extent to which The School Wellness Plan compares to model policy language and best practices for school wellness.

The Local Wellness Policy Report Card shall be reviewed and considered when developing any recommended changes to the Wellness Plan or determining that no specific changes need to be made. Any recommended changes to the Wellness Plan shall be forwarded for formal administrative consideration and possible administrative approval. The recommended changes may be forwarded by school officials who have school wellness leadership responsibilities and/or on behalf of the Wellness Steering Committee.

The School's completed Local Wellness Policy Report Card, along with any recommended changes to the Wellness Plan, shall be presented to the Board prior to being communicated to the public as outlined in Section VII below.

Notwithstanding the formal triennial assessment and reporting process, recommendations to update or modify this Wellness Plan (e.g., to replace a goal that has been achieved) may be brought forward for administrative consideration and possible action (i.e., approval, rejection, or modification) at any time.

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As a further means of evaluating the implementation of this Wellness Plan, including school compliance, the *[insert the position title of the primary wellness policy leader]* will:

1. Identify the data and other records that will be required to reasonably document and evaluate the progress that is being made with the specific goals, nutritional standards, and other requirements outlined in this Wellness Plan. Particularly with respect to the Wellness Plan goals and related action steps that have specific near-term target dates or that are otherwise short-term in nature, progress should be monitored and informally evaluated on an interim basis between the years of the formal evaluations described above. Ultimately, information from and the results of any such interim assessments will inform and can be incorporated into the next triennial assessment.

2. Communicate expectations to school-based personnel related to tracking school-level data and preparing and organizing other school-level records that will be needed for assessment purposes, emphasizing when such documentation should occur.

3. Periodically meet with school-based personnel to serve as a support resource regarding Wellness Plan implementation and to review and discuss the school's compliance and progress to date.

F. Reports and Other Communications Related to the Wellness Plan

The primary means that The School will use to inform the public of the content of this Wellness Plan, the status of implementation efforts, and the outcome of formal assessments will be through a prominent, wellness-themed web page or microsite that is part of The School's official website. Minimally, the following information will be prominently displayed or clearly linked on a continuous basis and without requiring any login or similar restriction on access:

1. The names, positions, and contact information of The School officials who have been designated as local wellness program leaders.

2. A complete copy of this Wellness Plan.

3. An executive-level summary of current Wellness Plan goals.

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4. An executive-level summary of the most recent updates or modifications to the Wellness Plan, if applicable.

5. A complete copy of at least the two most recent Local Wellness Policy Report Cards (once available).

6. Information regarding how interested stakeholders can become involved in the development, implementation, review, and updating of the Wellness Plan.

When electronically posting the above-identified information, The School will give due attention to using accessible formats and to the possible need to provide information in languages in addition to English.

In addition to electronic posting, at least once annually, The School will actively notify staff and school households of the Wellness Plan and how it can be accessed, and a similar active notice shall be given of the availability of each formal triennial assessment report (Local Wellness Policy Report Card) at the time each such report is completed.

Additional steps may be taken to draw attention to the web-based resources identified above, including (1) featuring prominent links to the resources on the home pages of The School's websites or web pages; (2) further promoting the availability of the information through school newsletters, The School-approved social media accounts, or other The School communications, and (3) mentioning the resources in connection with health and wellness-related presentations to parents and other community groups.

USDA Nondiscrimination Statement and Complaint Information:

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, sex, disability, age, or reprisal or retaliation for prior civil rights activity in any program or activity conducted or funded by USDA.

Persons with disabilities who require alternative means of communication for program information (e.g. Braille, large print, audiotape, American Sign Language, etc.), should contact the Agency (State or local) where they applied for benefits. Individuals who are deaf, hard of hearing or have speech disabilities may contact USDA through the Federal Relay Service at (800) 877-8339.Additionally, program information may be made available in languages other than English.

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To file a program complaint of discrimination, complete the USDA Program Discrimination Complaint Form, (AD-3027) found online at: http://www.ascr.usda.gov/complaint_filing_cust.html, and at any USDA office, or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by:

a. mail: U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1400 Independence Avenue, SW
Washington, D.C. 20250-9410;

b. fax: (202) 690-7442; or

c. email: program.intake@usda.gov.

This institution is an equal opportunity provider.

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STUDENTS WITH DISABILITIES

Adopted ___, 2021

Individuals with Disabilities Education Act

[NAME] (“The School”) shall provide a free, appropriate public education to all eligible students through age twenty-one in compliance with the Individuals with Disabilities Education Act (34 CFR Part 300, Vol. 71 Federal Register, No. 156 (August 14, 2006)), Subchapter V of Chapter 115, Wis. Stats., and PI 11, Wis. Admin. Code.

The School adopts the Wisconsin Department of Public Instruction Special Education Model Forms and Policies and Procedures Manual as the Board’s official policy in all practices and procedures relating to the education of children with disabilities in The School, in compliance with State and Federal laws and regulations. The Board further assures that all District employees shall comply with the procedures and responsibilities laid forth within the manual as updated periodically by the Wisconsin Department of Public Instruction.

Section 504/ADA

Pursuant to Section 504 of the Rehabilitation Act of 1973 ("Section 504"), the Americans with Disabilities Act of 1990, as amended ("ADA"), and the implementing regulations (collectively "Section 504/ADA"), no otherwise qualified individual with a disability shall, solely by reason of his/her disability, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance. The School does not discriminate against qualified individuals with disabilities in admission or access to, or participation in, or treatment in its programs or activities.

A “qualified individual with a disability" means a person who has, had a record of, or is regarded as having, a physical or mental impairment that substantially limits one or more major life activities.

The School will provide qualified individuals with disabilities under Section 504/ADA a free appropriate public education with specialized instruction and/or related aids and services to ensure the individuals have access to The School’s programs, activities, and benefits in the same manner as individuals without disabilities.

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STUDENT DISCRIMINATION COMPLAINT PROCEDURES

[Insert nondiscrimination language from policy]

If any person believes that there has been a violation of [NAME]'s ("The School") nondiscrimination policy, that The School has failed to meet any of its obligations under a state or federal nondiscrimination law, or that any unlawful discrimination has occurred (including harassment or prohibited retaliation) for which The School is responsible, he/she may bring forward a complaint under these procedures. It is The School's expectation that all such complaints will be brought forward and processed in good faith.

Complaints under these procedures shall normally be submitted in writing directly to The School's _______________ [You might consider - *Equal Educational Opportunities Compliance Officer ("Compliance Officer")*] under the following federal laws: Title IX, Section 504, and the Americans with Disabilities Act.

The following individual currently serves as the Compliance Officer:

[NAME], [JOB TITLE]
[OFFICE ADDRESS]
[OFFICE TELEPHONE], [ELECTRONIC MAIL]

The *[insert applicable position]* shall perform the duties of the Compliance Officer (including receiving complaints) if the Compliance Officer is temporarily unavailable or if a complaint involves any alleged improper conduct by the Compliance Officer.

Any person presenting a report or complaint under these procedures who has concerns about safety, confidentiality, or retaliation should discuss those concerns with the Compliance Officer as early as possible in the process — preferably at or even prior to the time that the detailed report or complaint is made.

In conjunction with The School's receipt of notice of any report or complaint of alleged discrimination or retaliation under these procedures, The School shall consider (and the complainant may affirmatively request consideration of) any interim measures that should be taken before the final outcome of an investigation (e.g., safety planning or other steps needed to protect the complainant and ensure equal access to The School's education programs and activities).

INFORMAL RESOLUTION OF COMPLAINTS AND CONCERNS

The School encourages the voluntary, informal resolution of student discrimination complaints or related concerns. For example, if an issue or concern is brought to the attention of an administrator and the administrator offers a resolution that is satisfactory

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to both The School and to the person who presents the issue(s), it is not necessary to initiate or complete a more formal investigation or to issue a formal determination of the complaint under the steps outlined below. However, if a complainant is not satisfied with a proposed resolution or believes the issue is too significant to pursue and resolve informally, the complainant may initiate (or continue to pursue) the formal procedures according to the steps listed below.

FORMAL COMPLAINT PROCEDURES

Step 1:

A written statement of the complaint shall be prepared by the complainant, signed, and submitted to the Compliance Officer or his/her administrative-level designee. The School has a form available for this purpose. The Compliance Officer shall investigate or coordinate an appropriate investigation of the issue(s) and, in a manner consistent with applicable student records laws, issue a written determination to the complainant and any other appropriate parties indicating the extent to which the complaint was or was not substantiated and including such other information as may be appropriate under the circumstances. This initial, written administrative determination shall normally be made within *[identify a timeline – e.g., 45 days of the filing of the statement of the complaint]*, although some matters may require additional time.

Step 2:

If any actual party in interest to the complaint (including any alleged victim/target or any alleged responsible party) wishes to appeal an initial administrative determination of a formal complaint, he/she may submit a signed statement of appeal to __________. After conducting any further inquiry into the matter that he/she deems appropriate, the ___________ shall formulate a conclusion and respond in writing to the appeal. The response will normally be issued within *[identify a timeline – e.g., 10 school/business days]*.

Step 3:

If any actual party in interest to the complaint disagrees with the determination of the complaint made by the ________, he/she may submit a written statement to the Governance Board of [NAME] that describes in reasonable detail the factual and/or legal basis for the person's disagreement with the previous determination. Within *[identify a timeline – e.g., 30 days]*, the Board shall address the appeal at a meeting. Upon its review of the appeal and the record of the complaint, the Board may affirm, reverse, or modify the previous determination or remand the matter for additional information. The Board may or may not meet with any of the parties in interest prior to reaching a decision. Notice of the Board's disposition of the appeal shall be sent by the Board Clerk, or his/her designee, to appropriate parties within *[identify a timeline – e.g., 10 days]* of reaching a disposition.

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Depending on the alleged basis of the discrimination (e.g., sex, disability, race, age, etc.), a complaint or appeal may also be made to the U.S. Department of Education's Office for Civil Rights (OCR) in Chicago, as authorized by various federal laws, or a complaint or suit may be filed with another external governmental agency or court. Such agencies and courts independently determine the extent to which any given complaint or appeal falls within their realm of authority. Such actions may be taken in lieu of or in addition to filing a complaint under The School's local procedures.

COMPLAINT PROCEDURE - SPECIAL EDUCATION

Discrimination complaints relating to the identification, evaluation, educational placement, or free appropriate public education of a student with a disability in connection with state and federal special education laws shall be submitted and processed in accordance with the applicable laws and regulations and The School's established special education policies and procedures.

MAINTENANCE OF COMPLAINT RECORDS

Records shall be kept under The School records retention procedures of all formal and informal written complaints submitted under these procedures. The records shall include information on all levels of the complaint and any appeals. To the extent applicable to a particular complaint, the retained records should normally include:

1. The name of the complainant and his/her title or status.
2. The date the complaint was filed.
3. The specific allegation made and any corrective action requested by the complainant.
4. The name(s) of any individually-identified the respondents.
5. The levels of processing followed, and the resolution, date and decision-making authority at each level.
6. The written evidence that was presented by a party or that was made a part of the record of the complaint.
7. A statement of the final resolution and the nature and date(s) of any corrective or remedial action taken.

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INTERNET SAFETY AND ACCEPTABLE USE

Adopted ___, 2021

Consistent with applicable federal laws, [NAME] ("The School") believes that the best approach to student safety as it relates to use of the Internet and other electronic resources involves a combination of technology protection measures, monitoring and instruction. The School's comprehensive approach to student Internet/technology safety shall take into account the differing ages and instructional levels of the students in The School.

It shall be the responsibility of the *[insert appropriate administrative/staff positions]* to:

1. Ensure that The School's systems and equipment that provide access to the Internet make active use of technology protection measures designed to block or filter Internet access to visual depictions that are:

    a. obscene;

    b. pornographic; or

    c. otherwise harmful to minors.

    Filtering, blocking or other protective technologies will also be used to decrease the likelihood that student users of The School's systems and equipment might access other materials or communications, other than visual depictions, that are inappropriate for students.

2. Develop and implement procedures that provide for the monitoring of students' and other authorized users' activities when using The School-provided equipment or The School-provided network access or Internet access. Such monitoring may sometimes take the form of direct supervision of students' and minors' online activity by school personnel, but The School recognizes that constant, direct supervision is not a practical expectation.

3. Develop and implement an instructional program that is designed to educate students about acceptable and responsible use of technology and safe and appropriate online behavior, including (a) safety and security issues that arise in connection with various forms of electronic communication (such as e-mail, instant messaging, and similar technologies); (b) interacting with other individuals on social networking sites and in chat rooms; and (c) cyberbullying awareness and response. Such educational activities shall include (but shall not consist exclusively of) reinforcement of the provisions of The School's rules regarding

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students' acceptable and responsible use of technology while at school.

4. Maintain, revise and enforce rules and procedures concerning the acceptable, safe, and responsible use of The School's Internet access infrastructure and other technology-related The School resources by any person who is authorized to use The School's systems and equipment, including any student, employee, or other authorized user. These rules and procedures shall:

    a. Address and prohibit the unauthorized collection, disclosure, use and dissemination of personal and personally-identifiable information regarding students and minors, as particularly applicable to technology-based resources;

    b. Address employees' obligations regarding the proper retention of The School records, maintaining the confidentiality of student records, and avoiding inappropriate disclosures of The School records;

    c. Prohibit unauthorized user access to systems, networks and data;

    d. Prohibit the use of The School resources to access and/or transmit inappropriate material via the Internet, electronic mail, or other forms of electronic communications;

    e. Provide notice to users that there is no The School-created expectation of privacy in their use of The School technology resources. Accordingly, except where prohibited by state or federal law: (1) The School reserves the ability to track, monitor, and access all data, files, communications, or other material that users create, store, send, delete, receive, or display on or over The School's Internet connection, network resources, file servers, computers or other equipment; and (2) all aspects of any individual's use of The School's technology-related equipment and resources, including any online activities that make use of The School-provided Internet access, may be monitored and tracked by The School officials; and

    f. Provide notice to users regarding possible consequences for violations of the policies, rules and procedures that govern the acceptable, safe, and responsible use of The School's technology-related resources.

The School may approve modified levels of Internet filtering/blocking for an individual user account provided that there is a legitimate educational purpose and any changes in access will not compromise the overall adequacy of protections that are in place for student users.

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HOMELESS CHILDREN AND YOUTHS

Adopted ___, 2021

Students who are homeless shall have equal access to the same free, public education as provided to other students in [NAME] ("The School"). They shall be provided the services and have access to the programs and activities that are offered to other children attending The School, including transportation services, educational services for which the children/youths meet eligibility criteria (e.g., special education, Title I programming, programs and services for English Learners), career and technical education programs, and school nutrition programs. This policy will be implemented in accordance with federal and state laws, and The School's non-discrimination policy.

Definitions

Homeless Children and Youths

The term "homeless children and youths" means individuals who lack a fixed, regular and adequate nighttime residence. It includes children and youths who are:

1. Living in an emergency or transitional shelter;
2. Abandoned in hospitals;
3. Living in a primary nighttime residence that is a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings;
4. Living in motels, hotels, trailer parks, or camping grounds due to lack of alternative adequate accommodations;
5. Living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings;
6. Sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; and

Migratory children (children whose parent or spouse is a migratory agricultural worker) and unaccompanied youths (youths not in the physical custody of a parent or guardian) may be considered homeless if they meet the above definition.

The School Homeless Liaison

The _________ is The School Homeless Liaison for homeless children and youths.

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Enroll and Enrollment

The terms "enroll" and "enrollment" mean attending school and participating fully in school activities.

School of Origin

The term “school of origin” means the school that a child or youth attended when permanently housed or the school in which the child or youth was last enrolled, including preschool if The School offers a public education to preschool children. When a child or youth completes the final grade level served by the school of origin, the school of origin includes the designated receiving school at the next grade level for all feeder schools.

Permanent Housing

The term “permanent housing” includes any signed lease or long-term approved living situation. Self-paying day-to-day in a motel is not considered permanent housing. If a child resides with a relative for an extended period of time (6 months or longer), the child will be considered to be permanently housed.

Status Determination

Homeless status is determined in cooperation with parents or, in the case of unaccompanied youths, The School Homeless Liaison. Homeless status may be documented through the Wisconsin Department of Public Instruction or through direct contact with The School staff. The School Homeless Liaison may affirm that a child or youth who is eligible and participating in a program and/or services in The School is homeless and eligible for such program and/or services.

School Selection

Placement in a school shall, according to the homeless child or youth’s best interest:

a. Continue the child or youth's education in the school of origin for the duration of homelessness when a family becomes homeless between academic years or during an academic year; and for the remainder of the academic year even if the child or youth becomes permanently housed during an academic year; or

b. Enroll the child or youth in any public school that non-homeless students who live in the attendance area in which the child or youth is actually living are eligible to attend.

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In the case of unaccompanied youths, The School Homeless Liaison or designee will assist in placement or enrollment decisions considering the requests of such unaccompanied youth.

Determining Best Interest

1. In determining a child or youth's best interest, The School presumes that keeping the homeless child or youth in the school of origin is in the child or youth's best interest, except when doing so is contrary to the request of the child or youth's parent or guardian, or unaccompanied youth.

2. When determining a child or youth's best interest, The School will consider student-centered factors, including factors related to the impact of mobility on achievement, education, health, and safety of homeless children and youths, giving priority to the request of the child or youth's parent or guardian or unaccompanied youth.

3. The school placement of siblings will also be considered when making the best interest determination.

4. If The School determines that it is not in the child or youth's best interest to attend the school of origin or school requested by the parent, guardian, or unaccompanied youth after conducting the best interest determination and considering student-centered factors, The School will provide the child or youth's parent or guardian or the unaccompanied youth with a timely, written explanation of the reasons for its determination, in a manner and form understandable to such parent, guardian, or unaccompanied youth including information regarding the right to appeal.

Enrollment and Residency

1. The School shall immediately enroll the child/youth, even if the child or youth lacks records normally required for enrollment. Records will immediately be requested from the previous school.

2. For purposes of school placement, any parent, guardian or person *in loco parentis* who has legal or physical custody of a homeless child or youth can enroll that child or youth directly in The School.

3. Homeless unaccompanied youths may enroll themselves in school.

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4. A homeless child or youth is a resident of a school district if the child is personally present somewhere within the district with a purpose to remain but not necessarily to remain permanently.

5. The child or youth shall be considered a resident of a school district when living with a parent, guardian, or person *in loco parentis* not solely for school purposes or for participation in extracurricular activities.

6. The address listed on the enrollment forms becomes proof of residency.

Comparable Services

Each homeless child or youth shall be provided services comparable to services offered to other students in The School for which the homeless student or youth meets the eligibility criteria.

The following are examples of programs and services to which homeless children and youths should be provided comparable services to other students in the school:

1. Public Preschool programs;
2. Transportation services;
3. English Language Learner or special education programs;
4. Programs for "At Risk" students;
5. Programs for gifted and talented students;
6. School nutrition programs;
7. Title I services;
8. Before and after-school programs; and
9. Programs in career and technical education.

Transportation

1. At the request of the parent, or in the case of an unaccompanied youth, The School Homeless Liaison or designee, transportation will be provided for homeless children or youths to the school of origin for the duration of the school year, even if the student becomes permanently housed. The School has the right to determine the mode of transportation to the school of origin.

2. If a child or youth's school of origin is The School, The School will provide transportation.

3. In the case where the homeless child or youth's school of origin and current school are different local educational agencies, The School will coordinate transportation with the other school and the two schools will share the cost

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through the duration of the homelessness. If the two schools cannot agree on how to share the transportation cost, they will share the expenses equally.

4. Transportation will be arranged promptly to ensure immediate enrollment and so as not to create barriers to homeless students' attendance, retention and success. Further, transportation services will be comparable to transportation services provided to students who are not homeless.

5. If The School determines that a family is sharing housing due to preference or convenience, that a child or youth is living with a relative in order to attend The School, or that a child or youth no longer meets the definition of homeless under federal law, transportation will be discontinued at the end of the academic year unless the child or youth is a student who is eligible for transportation under The School's transportation policy.

Duties of the School Homeless Liaison

The School Homeless Liaison or designee shall:

a. Ensure that homeless children and youths are identified by school personnel and through coordination with other entities and agencies.

b. Ensure that homeless children and youths are immediately enrolled in and have a full and equal opportunity to succeed at The School.

c. Ensure that homeless families, children, and youths have access to and receive educational services for which they are eligible and referrals to other appropriate services (such as health, dental, mental health, substance abuse services, and housing services).

d. Ensure that the parents or guardians of a homeless child or youth are informed of the educational and related opportunities available to them and are provided with meaningful opportunities to participate in the education of the child/youth. In the case of an unaccompanied homeless youth, ensure the youth is informed of these opportunities.

e. Provide public notice of the educational rights of homeless children and youths and ensure that notice is disseminated in such public places as schools, meal sites, shelters and other locations frequented by parents and guardians of homeless children and youths, and unaccompanied homeless youths, in a manner and form that is understandable to parents, guardians and unaccompanied youths.

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f. Monitor compliance with all policies and procedures related to the education of homeless children and youths.

g. Mediate enrollment disputes in accordance with the requirements of the McKinney-Vento Act.

h. Inform parents or guardians of a homeless child or youth, and homeless unaccompanied youths, of all transportation services, including transportation to the school of origin or to the school that is selected according to the homeless child or youth's best interest.

i. Coordinate services between The School and other homeless family service providers, and coordinate programs for homeless students with other federal and local programs.

j. Provide assistance to children and youths who do not have immunizations, health screenings, or immunization or other required health records, to obtain necessary immunizations, or immunization or other required medical records.

k. Ensure that students are not segregated on the basis of their status as homeless.

l. Coordinate with State coordinators and community and school personnel responsible for the provision of education and related services to homeless children and youths.

m. Attend trainings mandated by federal or state law and training or professional development on the definitions of terms related to homelessness specified in sections 103, 401, and 725 of the McKinney-Vento Act which will enable The School Homeless Liaison to affirm, without further agency action by the U.S. Department of Housing and Urban Development, that a child or youth who is eligible for and participating in a program provided by The School, or the child or youth's immediate family, who meets the eligibility requirements for a homeless assistance program or service authorized under Title IV of the McKinney-Vento Act, is eligible for such program or service.

n. Ensure that other school personnel receive professional development and other support on McKinney-Vento Act and homeless children and youth.

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o. Assist the [NAME] Board and administration, with input from homeless parents, youths and advocates, in identifying, reviewing and, if necessary, revising policies or practices that may act as barriers to the identification, enrollment, attendance, and school success of homeless children and youths, including:

1. Barriers due to outstanding fees or fines or absences, or missed application or enrollment deadlines;

2. Barriers due to school discipline policies that disproportionately impact homeless students;

3. Barriers to transportation,

4. Barriers due to records requirements for such items as immunizations, residency, birth certificates, school records, health records, guardianship, and other documents.

5. Barriers that impede the identification of and provision of services to students including those who are also children and youths of color; those who identify as lesbian, gay, bisexual, transgender, and queer or questioning (LGBTQ); English Learners; and students with disabilities, including eligible infants and toddlers with disabilities and their families;

6. Barriers that impede a student's receipt of appropriate credit for full or partial coursework satisfactorily completed while the student attended a prior school;

7. Barriers to accessing academic and extracurricular activities, including summer school, career and technical education, advanced placement, and online learning; and

8. Barriers to accessing and completing post-secondary education.

p. In conjunction with The School's pupil records custodian(s), ensure the privacy of student education records. In the case of homeless students, this shall include:

1. Establishing protections for records identifying the student's living situation and ensuring that information regarding living situations is not classified as "directory data" but is protected

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in the same manner as other non-directory records under the Family Educational Rights and Privacy Act (FERPA).

2. Determining whether a homeless student is a victim or survivor of domestic violence or has other safety issues that must be addressed in student records and information release procedures and ensuring that this information is properly protected from disclosure under FERPA and other applicable Federal laws.

q. Ensure that unaccompanied youths are enrolled in school, have opportunities to meet the same challenging State academic standards as the State establishes for other children and youths, and are informed of their status as independent students under section 480 of the Higher Education Act of 1965 and provide verification of this status.

Disputes

Any dispute regarding the eligibility, school selection, educational placement or transportation of homeless children and youths shall be expeditiously addressed through the process outlined below and mediated by The School Homeless Liaison.

1. If a dispute arises over enrollment in The School, the child or youth shall be immediately admitted to The School, pending resolution of the dispute, including all appeals.

2. Student eligibility, enrollment, and transportation decisions shall be made through the building principal in conjunction with The School Homeless Liaison.

3. The principal will provide the parent, guardian, or unaccompanied youth with a written explanation of how The School reached its decision regarding eligibility, school selection, and transportation, which will include the following information:

   - Description of the action proposed or refused by the school;
   - Explanation of why the action is proposed or refused;
   - Description of any other options the school considered;
   - Reasons why any other options were rejected;
   - Description of any other factors relevant to the school's decision and information related to the eligibility or best interest determination including the facts, witnesses, and evidence relied upon and their sources;

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- Timelines to ensure any relevant deadlines are not missed;
- Rights of the parent, guardian, or unaccompanied youth to appeal such decision; and
- Contact information for The School Homeless Liaison and State Coordinator, and a brief description of their __________________.

4. If this explanation is not satisfactory to the parents, guardians or unaccompanied youth, the building principal will review the decision and talk with the family.

5. If the decision is upheld by the principal and is still not satisfactory to the parents, guardians or unaccompanied youth, the _______________ will review the decision and make a decision based on that review.

6. If the parent, guardian or unaccompanied youth is still in disagreement with the decision, The School Homeless Liaison will provide a notice of the right to appeal to the State Superintendent of Public Instruction.

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FINANCE

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FRAUD PREVENTION

Adopted ___, 2021

The Board of Directors of [NAME], is committed to the responsible stewardship of all resources that are entrusted to the Board, including but not limited to all financial resources that are under the Board's management and control. Fraud, in any form and perpetrated by any person connected to the Board and [NAME] ("The School"), interferes with this commitment. Fraud can exist even in situations that do not involve the receipt of an improper private benefit. Examples of conduct that the Board prohibits and considers to involve fraud include the following:

1. Theft, misappropriation, or conversion;
2. Bribery, including certain quid pro quo arrangements and giving or receiving kickbacks;
3. The making of false claims, false records, false certifications, or other false statements;
4. Lack of performance of an obligation while accepting consideration for such performance;
5. Self-dealing or arranging for other private benefits that are contrary to the public interest, including making or receiving overpayments;
6. Providing information or making a representation that is intentionally incomplete or misleading, including failing to fully cooperate and be fully forthcoming in any investigation into possible wrongdoing;
7. Covering up wrongdoing (e.g., by destroying evidence);
8. The failure to receive, use, or expend resources for their intended or authorized public purpose, including the gross mismanagement of The School-controlled resources or engaging in non-authorized transactions; or
9. Aiding another person's fraudulent conduct.

To assist with the prevention, mitigation, and prosecution of fraudulent activity, the Board directs the administration to:

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1. Establish, model, and enforce strong ethical standards in all The School programs and operations;

2. Implement and monitor strong internal controls (i.e., systems and procedures) that can limit opportunities to engage in fraudulent conduct, identify irregularities, and reveal evidence of fraudulent conduct after it occurs;

3. Create and foster a climate that encourages and facilitates the timely reporting of fraud, suspected fraud, or suspicious circumstances that should be further investigated;

4. Diligently investigate all reasonably credible reports of fraud or possible fraud; and

5. When any instance of fraud is substantiated, engage in appropriate follow-up, including making additional state or federal reports and pursuing appropriate consequences and remedies (such as disciplinary action and/or referral for possible legal action).

Reports and Investigations of Fraud or Suspected Fraud

Except in situations where an employee exercises a legal right to make a confidential report to an external agency or to participate in an official investigation or legal proceeding that is not disclosed to his or her employer, any employee who has knowledge of or who has reason to suspect fraud or any similar impropriety in relation to any aspect of The School programs or operations shall immediately report the relevant circumstances to his or her supervisor and/or to the Chief Executive Officer ("CEO"). In the event the concern or complaint involves the CEO, the concern shall be brought to the attention of the *[insert alternative administrator – e.g., Business Manager]* and/or Board President. Such reports may involve or relate to the conduct of any person, including The School employees, Board members, volunteers, consultants, vendors, contractors and other parties maintaining any business or programmatic relationship with The School.

In directing employees to make the internal reports referenced in the previous paragraph, The School shall in no way prevent or interfere with an employee making a report or providing information to a state or federal regulatory or law enforcement agency (including the U.S. Department of Education's Office of Inspector General) or to any court or grand jury.

The Board also encourages any other person who has knowledge of or who has reason to suspect fraud or some other similar impropriety in relation to any aspect of The

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School programs or operations to report the relevant circumstances to the *[insert position(s) – e.g., CEO, Business Manager, or Board President]*.

No official, employee, or agent of The School may retaliate or discriminate against any person who, acting reasonably and in good faith, has filed a report under this policy or participated in any investigation related to a report of fraud, suspected fraud, or other similar impropriety. In connection with employees, prohibited retaliation and discrimination include discharge, demotion, or other adverse employment actions based upon an employee's protected activity.

Following a report of alleged or suspected fraud, and except in the case of a report involving his or her own actions, the CEO shall be responsible for initiating necessary investigations. Whenever necessary or appropriate, investigations will be conducted in coordination with The School's legal counsel and/or with other internal or external departments, agencies, or officials. Although strict and absolute confidentiality cannot be guaranteed, the confidentiality concerns of all involved parties shall be a consideration in the manner in which any investigation is conducted, including the manner in which relevant records are maintained.

To the extent required by federal law, The School shall make a report to the U.S. Department of Education (or other applicable federal agency's) Office of Inspector General any time The School has credible evidence of the making of any false claims for federal funds or the commission of a violation of any laws pertaining to fraud, conflict of interest, bribery, gratuity, or similar misconduct involving federal funds.

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EXPENSE REIMBURSEMENT

Adopted ___, 2021

The Board of Directors of [NAME], authorizes the reimbursement of employees of [NAME] ("The School") for certain work-related expenses that an employee either (1) pays for directly, or (2) incurs via the use of a personal vehicle for The School business. In addition to any reimbursement that is specifically approved by the Board, the administration may approve reimbursement of an employee's work-related expenses if the *[insert at least two positions – e.g., Chief Executive Officer or Business Manager]*, or an authorized designee, determines that the expense meets the following criteria:

1. The School has a reasonable factual basis for reimbursing the expense without the reimbursement being treated as taxable wages to the employee, including information that supports the business-related reason for the expense.

2. The expense is reasonably necessary and does not materially conflict with The School policies.

3. Subject to any Board-authorized exceptions, the employee must have obtained advance approval from The School (as set forth above) to incur the expense, either generally or specifically — such as by policy, by contract, or by an authorized supervisor.

    a. An example of general approval would involve an employee's supervisor-approved attendance at a two-day professional development activity that requires an overnight stay. The approval of the employee's attendance encompasses approval of the directly-related travel expenses that otherwise qualify for reimbursement.

    b. The Board authorizes the *[insert at least two positions – e.g., CEO and Business Manager]*, as an exercise of administrative discretion, to grant an exception to the advance-approval requirement where the employee demonstrates that there is sufficient cause for an exception and the expense otherwise clearly qualifies for reimbursement.

4. Subject to any Board-authorized exceptions, the amount of the reimbursement shall not exceed the lesser of the actual expense incurred or the maximum reimbursement amount established by The School for the expense, if any.

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5. The School may set a maximum reimbursement amount (or rate) via a general schedule approved by the Board, via an approved contract or grant, or via a supervisory directive that is issued in connection with a specific situation that is not covered by a general schedule.

    a. The Board authorizes the *[insert at least two positions – e.g., CEO and the Business Manager]*, at his/her discretion and with written documentation *[insert if desired: "and notice to the Board"]*, to approve a deviation from any standard maximum reimbursement amount where he/she determines that circumstances beyond the reasonable control of the employee justify the deviation and that doing so is in the best interests of The School.

    b. The *[insert at least two positions – e.g., CEO and the Business Manager]* may, at their discretion, determine that a request for reimbursement of an expense in an amount that was not specifically approved in advance is clearly excessive and, as a result, take appropriate action (such as denying full reimbursement).

6. The employee substantially complied with The School procedures regarding expense reimbursement, as established by the administration, and with any supervisory directives related to the expense. At a minimum, the administrative reimbursement procedures shall:

    a. Be consistent with the requirements for an accountable expense reimbursement plan under Internal Revenue Service standards, such as that the recipient of reimbursement must account for each expense within a reasonable period of time;

    b. Address supervisory signoff/review of reimbursement requests; and

    c. Require the employee to provide adequate substantiation of each reimbursed expense via The School-approved documentation (e.g., itemized receipts).

    d. If applicable, the employee followed all procedures required to obtain reimbursement of an expense under a specific state, federal, or private funding source, such as a grant.

    e. No employee may be the individual who gives final approval for reimbursement of his/her own reimbursement requests or who

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approves any exceptions related to his/her own reimbursement requests.

The School may deny a request for reimbursement, in whole or in part, if an employee fails to meet any of the above-listed requirements in connection with a reimbursement request.

An employee must promptly return any excess reimbursement/payment (e.g., upon the recipient's own calculation/discovery or upon receiving notice if an error or overage is first discovered by another person). Failure to follow The School's expense reimbursement policies and procedures is also grounds for possible discipline.

Employees who request expense reimbursement and supervisors who authorize and approve reimbursable expenses are further expected to adhere to the following guidelines and parameters regarding expense reimbursement:

1. The School employees are expected to be reasonably diligent in avoiding excessive costs and in utilizing reasonable, low-cost options.

2. The primary intent of the expense reimbursement process is to reimburse employees for personal, but work-related eligible expenses (such as those incurred while travelling for a business purpose). While occasional reimbursement for direct employee purchases of goods or services that are ultimately delivered to The School may be necessary in unusual or emergency circumstances, supervisors and employees shall not use the expense reimbursement process to regularly contravene or willfully avoid The School's purchasing, procurement, and payment procedures for such goods or services.

3. When practical, employees and supervisors should attempt to arrange for direct The School payment of known and predictable expenses, such as conference registration fees and reserved hotel accommodations, particularly when doing so will facilitate avoiding a charge for sales tax.

4. A supervisor may require an employee to make specific purchases, use specific vendors, or use specific methods of travel where doing so is deemed to be in the best interest of The School. For example, a supervisor may direct an employee to obtain a rental vehicle for certain work-related travel when reimbursing mileage for the business use of a personal vehicle would be comparatively cost-prohibitive, or the supervisor may arrange with the employee to cap mileage reimbursement for the trip at the cost of an available, less-expensive travel option.

5. The School does not reimburse employees for any of the following:

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a. The cost of any alcohol purchased in connection with a reimbursable meal or work-related function.

b. The cost of parking violations or traffic violations/citations incurred while operating a personal vehicle for work-related business.

c. The cost of any personal entertainment and social events (e.g., a golf outing) that may be associated with a conference, convention, training, or similar event.

d. Additional costs attributable to the employee's family member(s) or other guest(s).

e. *[Insert any other non-reimbursable costs that The School wishes to expressly document.]*

(You may wish to do an internal policy with mileage rates and limit, other reimbursement limits, and methods of payment)

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STUDENT FEES

Adopted ___, 2021

The administration of [NAME] ("The School"), under the direction of the *[insert appropriate position - e.g., business manager]* and in consultation with The School's financial auditor as needed, shall develop cash-handling procedures that are consistent with sound business practices and that are appropriate for particular building functions and operational needs. As general parameters, such cash-handling procedures shall:

1. Promote safe and secure cash management and minimize opportunities for theft or loss by, for example, utilizing secured locations within buildings and making regular transfers to an approved depository;

2. Promote accurate cash management and accurate recordkeeping by, for example, consistently issuing receipts and using other methods of reconciling accounts and funds;

3. Promote the security and privacy of sensitive financial data, including The School and personal account numbers, other account access information, etc.; and

4. Minimize the extent to which any individual has sole responsibility for cash handling and cash/account reconciliation in connection with specific activities and functions.

The School funds may be deposited only in The School accounts that have been established at a financial institution that is a Board-approved depository.

The *[insert appropriate position – e.g., business manager]* shall have primary responsibility for verifying that relevant personnel are aware of their responsibility to consistently follow established cash-handling procedures.

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GRANTS

Adopted ___, 2021

Grants from federal, state, local, and private entities can be a valuable and important source of funding and other resources for various programs and activities of [NAME] ("The School"). At the same time, grant opportunities often require The School to commit significant resources to the grant application and grant administration processes, and some grants require The School to commit funds and/or make other specific operational or programmatic commitments related to the acceptance and use of the grant. Accordingly, subject to the exceptions identified below, the following apply to seeking and accepting grants on behalf of The School:

Employees shall obtain approval from a supervising administrator prior to applying for new grants on behalf of The School.

At a minimum, the administration shall review a request to pursue a grant application in light of factors that are substantially similar to the factors that The School would consider when evaluating a gift or donation that might be offered for a similar purpose, such as whether the grant would be substantially likely to impose any undesirable or unacceptable costs (whether direct or indirect) upon The School and whether the terms of the grant would be sufficiently compatible with The School's curricular, technological, instructional, programmatic, and operational practices. The administration shall also consider the resources required to apply for and, if it is accepted, administer the grant.

The administration is strongly encouraged to present a proposal to pursue a grant to the Board of Directors of [NAME], for approval prior to the submission of even a non-binding grant application where the administration determines that the amount, structure, conditions, or purpose of the grant warrants advance Board evaluation and input (e.g., where the grant would require The School to hire new staff, establish a new program, or require The School to provide matching funds).

> Except as otherwise approved or authorized by the Board, the administration shall ensure that a grant application, if approved by the grantor, remains subject to final acceptance by the Board before The School is committed to receiving, implementing, and administering the grant.

Except as otherwise approved or authorized by the Board, the Board shall approve final acceptance of a grant that The School commits to receiving, implementing, and administering. (Optional: Unless the terms of the grant itself require direct Board approval, the Chief Executive Officer ("CEO") may accept a monetary grant on behalf of the Board if the value of the grant is no more than [insert amount: $#, ###] and if the only material conditions of the grant are that the funds must be used for a specified

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cost/purpose that The School is reasonably likely to incur even if the cost is not funded by the grant.)

The CEO and/or the Business Manager shall determine whether the receipt or expenditure of grant funds requires approval by the Board as an amendment to a previously-adopted annual budget. The CEO shall ensure that the Board approval is secured for any necessary budget amendments.

Upon acceptance and receipt, all grant-based funding shall be adequately segregated and accounted for in accordance with the terms of the grant, applicable law, and the Wisconsin Uniform Financial Accounting Requirements (WUFAR).

Notwithstanding any requirements that might otherwise apply under this policy, the Board authorizes and expects the administration to take all steps that are required to ensure that The School timely applies for and receives The School's regular, year-to-year sources of state and federal funding, even if such state or federal funds are deemed grants by their enabling legislation or regulations. This includes periodic renewals of existing state and federal grants. Regarding such state and federal funding sources, specific Board action is required only to the extent mandated by the requirements of the particular state or federal program.

In connection with The School's acceptance or administration of any grant that provides aids, benefits, or services to students from a private agency, organization, or person, The School shall not unlawfully discriminate on the basis of age, sex, color, race, religion, national origin, ancestry, creed, pregnancy, marital or parental status, sexual orientation, physical disability, mental disability, emotional disability, or learning disability, or any other category protected by applicable law.

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INTERNAL FINANCIAL CONTROLS

Adopted ___, 2021

[NAME]'s ("The School") internal financial controls consist of a combination of policies, procedures, systems, communication/education initiatives, and monitoring activities. Internal controls exist for a variety of reasons, including to demonstrate accountability for The School's receipt, holding, and of public funds for authorized and appropriate public purposes. More specifically, internal controls help The School demonstrate and provide reasonable assurance of (1) effectiveness and efficiency of operations; (2) reliability of reporting for both internal and external uses; (3) adequate safeguards for protected personally-identifiable and other sensitive or confidential information; and (4) compliance with applicable laws, regulations, and contracts.

In terms of internal controls surrounding expenditures and procurement, the controls shall be a means of assuring that The School expenditures are sufficiently necessary, reasonable, authorized, allocable (e.g., to the appropriate accounting funds, budget line items, and/or revenue sources), and documented.

The *[insert position(s) – e.g., Business Manager]* have primary and overall administrative responsibility to ensure that reasonable and sufficient internal financial controls are identified, implemented, monitored, and enforced. The Board of Directors of [NAME], expects The School's internal controls to be regularly assessed for their adequacy, effectiveness, and efficiency. When deficiencies or areas for improvement are identified through an internal review, an audit finding, or some other source, the Board expects appropriate changes to be promptly implemented or promptly recommended to the Board (i.e., when Board approval for a specific change is sought or required).

Responsibilities and Controls Related to Federal Programs and Awards

To the extent permitted by law, the Chief Executive Officer ("CEO") or his/her administrative-level designee(s) are authorized and directed to act on behalf of the Board in applying for federal funding/awards and in preparing and submitting reports related to such funding/awards. The School accounting procedures shall identify all federal funds received and expended and the specific federal programs under which they were received.

The *[insert position(s) – e.g., Business Manager's]* responsibilities related to internal controls include administrative supervision of The School's internal control over

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compliance requirements for federal awards. The Board's expectation is that The School's processes related to such federal compliance will be sufficient to provide reasonable assurance that:

1. Transactions related to federal awards are executed in compliance with applicable federal statutes and regulations and any specific terms and conditions of a federal award.

2. Transactions related to federal awards are properly recorded and accounted for, in order to:

    a. Permit the preparation of reliable financial statements and federal reports;
    b. Adequately demonstrate the specific source and application of federal funds;
    c. Maintain accountability over assets; and
    d. Demonstrate compliance with federal statutes, regulations, and the terms and conditions of each specific federal award.

3. The School maintains effective control over funds, property, and other assets that are subject to federal requirements, including safeguarding such assets from loss and ensuring that the assets are used solely for authorized purposes.

4. The School maintains adequate written procedures governing procurement, payment, and allowability of costs.

Examples of specific federal compliance issues that the *[insert position(s) – e.g., Business Manager, and their administrative-level designees]* are charged with overseeing include (1) verifying and ensuring that The School appropriately documents that all claimed costs under federal awards are allowable costs; (2) developing and overseeing procedures associated with tracking, allocating, and certifying staff time and compensation to particular federal awards; (3) developing and overseeing procedures associated with documenting The School's maintenance of effort requirements in connection with specific federal awards; (4) ensuring that The School uses appropriate procurement methods and procedures for federally-supported transactions, including maintaining records sufficient to detail the history of such transactions; (5) maintaining adequate oversight of the performance of The School vendors and contractors connected to federal awards; and (6) providing adequate training for employees whose work and work procedures are directly affected by the compliance requirements for federal awards.

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STUDENT FEES

Adopted ___, 2021

Reasonable student fees may be charged in connection with certain items, materials, and activities. Except as otherwise provided in this policy or authorized by the Board of Directors of [NAME], the Board shall approve the amount of each student fee, and may do so by adopting a schedule of various fees. When establishing a fee, the Board may expressly identify whether the fee is subject to possible waiver (in whole or in part) based on ability to pay. However, if the Board fails to specify whether a particular fee is subject to possible waiver, the fee shall be considered *[choose one of the following as a default: "non-waivable except as otherwise required by law" OR "waivable upon a proper application"]*.

The following are express exceptions to the normal requirement of Board approval of student fees:

1. *[Insert a list of any known exceptions, otherwise delete the list and the previous line of the sample. The following is an example of a possible exception: "The administration may establish a fee to cover direct costs associated with a specific school field trip or school outing, not to exceed $10 per student. This fee is subject to possible waiver."]*

Parents and guardians who claim that the financial condition of their families is such that they cannot afford to pay the established fees may request that the fees be waived or reduced. All fee waiver/reduction requests shall be submitted in writing. The Chief Executive Officer ("CEO") or designee shall approve or deny the request according to any lawful means.

______________ shall be responsible for the accurate and timely collection of student fees in accordance with proper accounting procedures. It is the Board's expectation that all reasonable efforts shall be taken to ensure the collection of all fees due to The School. To the extent permitted by law, the administration may withhold school-related privileges from a student/family who refuses to pay applicable fees or who refuses to accept or fails to adhere to a payment plan offered by the administration. After the administration holds or attempts to arrange an in-person meeting with a parent or guardian, makes a good faith effort to offer a payment plan for the amount owed, and provides a final notice of the amount due, the Board authorizes the CEO to pursue legal action through small claims court for the collection of unpaid fees due The School. The CEO shall inform the Board when such legal action is being taken.

This policy does not apply to the establishment of school meal or food and beverage prices or to the processing of applications for free or reduced-price school meals.

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MISCELLANEOUS

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USE OF COPYRIGHTED MATERIALS

Adopted ___, 2021

[NAME] ("The School") intends and expects that copyright laws will be observed at The School. Specifically, no person shall unlawfully duplicate, reproduce, distribute, or display copyrighted materials in connection with any The School-sponsored activity, on The School property, or using The School equipment or technology resources. In addition, only appropriately licensed software, programs, and applications shall be used with The School's technology resources or to otherwise conduct The School programs or operations.

The School expects all staff members and students to follow applicable legal requirements and The School guidelines as to the use of copyrighted materials of all types and formats (including materials in electronic/digital formats). Staff members and students are also expected to actively seek guidance and direction from a library media specialist or from an administrator in the event of any uncertainty regarding the appropriate and lawful use of copyrighted materials.

The School administration shall (1) to implement initiatives intended to inform staff members and students about the appropriate use of copyrighted materials; and (2) to promote consistent adherence to applicable requirements and guidelines. The School guidelines shall describe the general boundaries of the limited "fair use" exception that is found in the copyright law (e.g., guidelines for staff for the recording and use of broadcast programming for educational purposes) and may include such other information as the administration deems appropriate.

Possible violations of copyright laws occurring within The School may be brought to the attention of *[insert appropriate position – e.g., the Director of Business Services]*. The *[insert position – e.g., Director of Business Services]* shall then ensure that any confirmed violation is promptly remedied.

Copyright violations can lead not only to The School-imposed consequences but also to legal consequences. To the extent consistent with applicable law, a person who commits copyright infringement while using The School equipment may incur individual and personal liability for their actions.

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ACCESS TO RECORDS

Adopted ___, 2021

[NAME] ("The School") recognizes the importance of access to public records and therefore, shall maintain and provide access to public records in accordance with applicable laws and the procedure set forth below.

Legal Custodian

[*Include position]* shall serve as the legal custodian of records for The School. The legal custodian is vested with full legal power to render decisions and carry out the duties of The School under the Wisconsin Public Records Law.

General Accessibility of Records

1. Members of the public may request access to the public records that are under the supervision of the legal custodian by submitting a request to the records custodian during the regular business hours, which are Monday through Friday from *[identify the appropriate office hours – e.g., 7:30 a.m. to 4:30 p.m.]*, except for holidays and such other exceptions as may be established in connection with the school calendar.

2. A requester will be permitted to use facilities to inspect or copy a record.

3. The legal custodian of records or his/her designee may require supervision of the requester during inspection or may impose other reasonable restrictions to maintain the security of the record(s).

Record Requests under the Wisconsin Public Records Law

1. All requests to inspect or copy a public record shall be made to the legal custodian.

2. All requests must be reasonably specific as to the subject matter and time period of the records covered by the request.

3. Record requests may be made orally or in writing.

4. At the discretion of the records custodian, and where there are legitimate reasons for doing so, the records custodian may promptly contact the requester

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to seek clarification of an ambiguous request prior to seeking responsive records or providing a formal response.

5. A requester may be required to show acceptable identification whenever the requested record is kept at a private residence, whenever security reasons require such measures, or where applicable state or federal law otherwise requires or permits an authority to request identification.

6. The legal custodian is not required to create new records that do not presently exist in response to any request for information.

7. The records custodian is authorized by applicable law to reject “standing requests” for access to records that do not exist at the time of the request, but that may be created at a later date.

Responses to Records Requests

1. All requests will be processed as soon as practicable and without delay. The time it takes the custodian to respond to the request will depend on factors including the nature and extent of the request and the availability of staff and other resources necessary to process the request. Access to inspect or copy records on the same day that the request is submitted is available only in limited circumstances.

2. Not all records created or maintained by The School are subject to inspection or copying by the public. In some cases, only a portion of record is subject to public inspection, while the remaining portion must remain confidential.

3. In the event a records custodian denies a records request, either in whole or in part, the custodian shall identify the reasons that access to the records is being denied.

4. If a written request is denied in whole or in part, the requester shall receive a written statement of the reasons for the denial. Verbal requests may be denied verbally unless the requester makes a demand for a written statement of the reasons denying the request within five business days of the oral denial.

    a. If the records custodian issues a written denial of a request, the custodian must also expressly notify the requestor within the response that the denial is subject to review in an action for mandamus under section 19.37(1) of the Wisconsin Statutes, or by application to the district attorney or attorney general.

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Fees

The following fees are authorized to be charged to persons who request to inspect or obtain a copy of records, to the extent such request is submitted, or responded to, under the Wisconsin Public Records Law:

1. [*Identify the appropriate per page amount – e.g. $0.20* per side of a page for each paper copy that is made of any standard-size paper record. Separate charges, not to exceed the actual, necessary and direct costs, may apply for issuing copies of photographs, electronic records, records which require transcription, or other specialized records. Copying charges do not apply if The School, at its discretion, permits a requestor to make his/her own copies.

2. The actual, necessary and direct cost of photographing and photographic processing for providing a photograph of a record, when the record does not permit standard copying.

3. There shall be no charge for the costs associated with locating a record unless the actual, necessary and direct location costs associated with the request exceed $50, in which case the entire actual cost shall be imposed upon the requester. Where staff time is charged as an actual and necessary cost of responding to a records request, the charge shall be calculated using the compensation of the lowest-compensated employee having the knowledge and skills needed to competently perform the task(s), regardless of who actually performs the task(s).

4. If records are mailed to the requester, the actual, necessary and direct postage/shipping costs.

5. If a record is produced or collected by a person outside The School pursuant to a contract entered into by that person and The School, the fee charged for copying the record shall be the actual, direct and necessary cost of reproduction incurred by the person making the reproduction or transcription of the record, unless a fee is otherwise authorized or established by law.

6. Prepayment of authorized fees may be required for any request where the total fees exceed $5. A request for any prepayment of or deposit on fees shall be based upon a good-faith estimate of the likely costs of responding to the request, with any difference to be refunded or collected once the actual amount is known.

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WEAPONS

Adopted _____, 2021

All students, staff, and visitors are prohibited from possessing, storing, making, or using a weapon at school or on or in any school property, including leased or owned facilities or vehicles, or at any school-sponsored activity or event.

A “weapon” is any object which, in the manner in which it is used, is intended to be used, or is represented, is capable of inflicting serious bodily harm or property damage, as well as endangering the health and safety of persons. Weapons include, but are not limited to, firearms (including, but not limited to, firearms as defined in 18 U.S.C. 921(a)(3)), guns of any type whatsoever, including air and gas-powered guns (whether loaded or unloaded), knives (subject to the exceptions below), razors with unguarded blades, clubs, electric weapons, metallic knuckles, martial arts weapons, chemical agents, ammunition, and explosives.

All students, staff, and visitors are also prohibited from possessing, storing, making, or using objects which resemble weapons such as cap guns or water guns.

Anyone who violates this policy will be subject to discipline according to the [school’s] Discipline Policy and referred to law enforcement, as appropriate.

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SEARCHES

Adopted _____, 2021

The ________ must maintain a safe and orderly environment for all students and staff. Accordingly, _____ may search school property used by students or the person or property of a student. The school retains ownership and possessory control of a student's desks and lockers (or other property assigned to students) and the same may be searched at random by administration at any time and no showing of reasonable cause or suspicion is necessary. Students shall not have an expectation of privacy in lockers, desks, cubbies, or other school property which would prevent _______ from conducting a search. Students enrolled in _____ and their parents and guardians shall be notified of this policy.

________ recognizes that the privacy of students or his/her belongings may not be violated by unreasonable search and seizure and directs that no student be searched without reasonable suspicion that the search will turn up evidence that the student has violated or is violating either a particular law or a policy or rule of __________. Any search under this paragraph must be reasonable in scope and reasonable in the manner in which it is conducted. The extent of the search will be governed by the seriousness of the suspected infraction, the student's age and gender, the student's disciplinary history, and any other relevant circumstances or information.

Under no condition shall a student be stripped searched by an employee of ___________.

[Include language about searching cars on parking lot, if applicable]

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PROPERTY INVENTORY or CAPITALIZATION

Adopted ___, 2021

As stewards of the SCHOOL NAME property, the Governance Board recognizes that efficient management and full replacement upon loss requires accurate inventory and properly maintained property records.

The Governance Board shall maintain a continuous inventory of all SCHOOL NAME-owned equipment and supplies, including computing devices annually.
For purposes of this policy, "equipment" means tangible property (including information technology systems) having a useful life of more than one (1) year and a per-unit acquisition cost which equals or exceeds ($1000 - $5000).

Capital assets include equipment as well as the following:

A. land, buildings (facilities), and intellectual property (including software) whether acquired by purchase, construction, manufacture, lease-purchase, exchange, or through capital leases

B. additions, improvements, modifications, replacements, rearrangements, reinstallations, renovations or alterations to capital assets that materially increase their value or useful life (not ordinary repairs and maintenance)

Capital expenditures, which are expenditures for capital assets, require prior written approval in order to be allowable in certain situations. General purpose equipment, buildings, and land, as well as improvements to land, buildings, or equipment which materially increase their value or useful life, are unallowable as direct charges unless the Federal awarding agency or pass-through entity provides prior written approval. Whereas capital expenditures for special purpose equipment are allowable as direct costs, provided that items with a unit cost of ($1000 to $5000) or more have the prior written approval of the Federal awarding agency or pass-through entity.

When defining supplies for inventory purposes, no items will be counted whose total acquisition cost is less than ($1,000 - $5,000).

"Computing devices" are machines used to acquire, store, analyze, process, and publish data and other information electronically, including accessories for printing,

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transmitting and receiving, or storing electric information. Examples of computing devices include laptops, smartphones, tablets, etc. Computing devices are classified as equipment if their acquisition cost meets the above-mentioned equipment threshold. Computing devices that do not meet the acquisition cost threshold are considered supplies. Regardless of whether a computing device is classified as an equipment or supply, it must be counted during the inventory.

It shall be the duty of the POSITION TITLE to ensure that inventories are recorded systematically and accurately and property records of equipment are updated and adjusted annually by reference to purchase orders and withdrawal reports. Equipment and computing devices acquired under a Federal award will best upon acquisition to SCHOOL NAME, subject to the following conditions:

A. The property shall be used in the program or project for which it was acquired as long as needed, whether or not the project or program continues to be supported by the Federal awards.

    1. When no longer needed for the original program or project, the property may be used in other activities in the following order of priority: (1) activities under a Federal award from the Federal awarding agency which funded the original program or project; then (2) activities under Federal awards from other Federal awarding agencies.

    2. During the time that property is used on the project or program for which it was acquired, __________________ must also make the property available for use on other projects or programs currently or previously supported by the Federal program, provided that the use will not interfere with the work on the original project or programs.

B. The property shall not be encumbered without the approval of the Federal awarding agency or the pass-through entity.

C. The property may only be used and disposed of in accordance with the provisions of the Federal awarding agency or the pass-through entity.

D. Property records shall be maintained that include the following:
    1. description of the property;

    2. serial number or other identification number;

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3. source of funding for the property;

4. acquisition date;

5. acquisition cost;

6. percentage of Federal participation in the project costs for the Federal award under which the property was acquired;

7. location;

8. ultimate disposition data including the date of disposal and sales price.

E. A physical inventory of the property must be taken and results reconciled with property records at least once every two (2) years, in accordance with this policy.

F. Adequate maintenance procedures shall be implemented to keep the property in good condition.

G. A control system shall be developed to provide adequate safeguards to prevent loss, damage, or theft of the property. Any such loss, damage, or theft shall be documented, investigated, and reported.

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