

**SCHOOL DISTRICT OF PITTSVILLE  
BOARD POLICY**

## **BOARD OPERATIONS**

### **SCHOOL DISTRICT MISSION**

110

The School Board of the School District of Pittsville sets forth the following statements to describe the vision and fundamental purpose of the District and its schools:

#### **MISSION STATEMENT**

Expecting **Excellence** and **Integrity** from all, developing **Innovative** students, strengthened through **Partnerships** with parents and the community.

#### **VISION**

Expecting Excellence and Innovation, Honoring Legacy and Embracing Partnerships.

#### **BELIEF**

We Believe all Children...

- Need to experience success.
- Are unique individuals and deserve to be treated as such.
- Need high expectations to maximize their potential.
- Make mistakes and deserve a second chance at success.
- Deserve instruction in a style which best matches their ability to learn.

It is the Board's intent that the above statements will guide and influence the work of the District's leadership team, the formulation of the District's strategic priorities, and the formulation of short-term and long-term goals at all levels of leadership, programs, and operations.

The Board believes that one of the important functions of the District's leadership team is to successfully communicate and reinforce the District's vision and guiding principles throughout the school community.

*Revised: October 10, 2011*

*Updated: May 9, 2016*

# SCHOOL DISTRICT OF PITTSVILLE BOARD POLICY

## SCHOOL DISTRICT LEGAL STATUS

120

### ~~TYPE OF SCHOOL DISTRICT~~

The **legal and** official name of the district shall be School District of Pittsville (“District”).

The District is organized and operated as a public school district under the Wisconsin Constitution, under Chapters 115 to 121 of the state statutes, and under other applicable laws and regulations as a Common School District that operates both elementary and high school grades.

In addition to the public school grades operated by the District, the District operates such other programs and conducts such other activities as may be required by applicable law, and the District may further operate other programs and activities to the extent permitted by the applicable law.

*Legal Ref:*

*Wisconsin State Statutes*     [Chapter 120](#) [school district government]  
   [Section 120.12](#) [school board duties]  
   [Section 120.13](#) [school board powers]

*Adopted:*     *February 9, 1987*

*Revised:*     *October 13, 2003*

*Updated:*     *May 9, 2016*

**SCHOOL DISTRICT OF PITTSVILLE  
BOARD POLICY**

## **INSTRUCTION**

### **EDUCATIONAL PROGRAMS**

#### **SPECIAL AND ALTERNATIVE EDUCATION PROGRAMS**

#### **SERVICES / PROGRAMS FOR ENGLISH LANGUAGE LEARNERS**

342.7

The School Board recognizes that within the District there are students whose primary language is not English. The Board shall provide appropriate educational and support services for these students to help them acquire English language skills that will enable them to function successfully in an all English classroom and help them meet established academic standards.

The District shall assess the English proficiency and academic progress of English language learners (ELL) in accordance with legal requirements and established District procedures. The degree of curricular and instructional modification, type of support services and their duration shall be determined individually based on student need.

Decisions regarding the administration of state-required tests to ELL students shall be made on a case-by-case basis. Any ELL student exempted from taking a state-required test shall be administered an alternative assessment approved by the Department of Public Instruction.

The results of both state-required tests and alternative assessments shall be used consistent with District policies in making instructional, promotion and graduation decisions. Test results may not be used as the sole criterion in re-classifying an ELL student from a bilingual-bicultural education program or in determining grade promotion, eligibility for courses or programs, eligibility for graduation or eligibility for participation in postsecondary education opportunities. Exemption of an ELL student from taking a state-required test may also not be used as the sole criterion for making such determinations.

Parents and guardians of ELL students shall be notified of student testing arrangements and of educational programs and services available to help their children improve their English language skills and academic achievement. These notifications shall be made consistent with legal requirements and in such manner as to ensure that the student's parent or guardian understands them.

Students shall be exited from ELL programs or services when they have met the District guidelines and state criteria for English proficiency. Once students have been exited, they shall no longer be tested on their English proficiency or receive state testing accommodations for ELL students. Former ELL students shall be monitored for two years after exiting the program. If during that time, it is determined that the student was exited from the ELL program prematurely, he/she shall be placed back in the program.

#### **Legal References:**

##### **Wisconsin Statutes**

<a href="#">Section 115.96</a>	[determining count of limited-English proficient students; establishing bilingual-bicultural programs]
<a href="#">Section 115.97</a>	[bilingual-bicultural programs required]
<a href="#">Section 118.13</a>	[student nondiscrimination]
<a href="#">Section 118.30(2)(b)2</a>	[state assessments; accommodations for limited-English proficient students]
<a href="#">Section 121.02(1)(r)</a>	[school district standard; standardized 3 <sup>rd</sup> grade reading test]
<a href="#">Section 121.02(1)(s)</a>	[school district standard; state assessments]

**Wisconsin Administrative Code**

[PI 8.01\(2\)\(r\)](#) [standardized 3<sup>rd</sup> grade reading test; procedures required for testing LEP students]

[PI 13](#) [school board requirements related to limited-English proficient students, including policy requirements]

**Federal Laws**

[Elementary and Secondary Education Act \[Part A - Subpart 1\]](#) [academic standards, assessments and accountability for student achievement, including limited-English proficient students]

[Title III of the Elementary and Secondary Education Act](#) [language instruction for limited English proficient and immigrant students]

**Federal Regulations**

34 C.F.R. §200.6(b) [federal regulations regarding mandated testing and assessment of ELLs]

**Cross References:**

342.7 Rule Procedures for Testing and Assisting English Language Learners  
342.7 Exhibit Home Language Survey

*First Reading: April 11, 2016*

*Second Reading and Approval: May 9, 2016*

**SCHOOL DISTRICT OF PITTSVILLE  
BOARD POLICY**

## **INSTRUCTION**

### **EDUCATIONAL PROGRAMS**

### **SPECIAL AND ALTERNATIVE EDUCATION PROGRAMS**

### **SERVICES / PROGRAMS FOR ENGLISH LANGUAGE LEARNERS**

**342.7- RULE**

#### **A. Identification of English Language Learners**

1. All new students enrolling in the District will be asked to complete a home language survey. The survey will be used to identify the following students for further evaluation and possible eligibility for the District's services or programs for English language learners (ELLs):
  - a. Students who communicate in a language other than English; or
  - b. Students whose families use a primary language other than English in the home; or
  - c. Students who use a language other than English in daily non-school surroundings.
2. After any initial identification as provided above, or after some other initial referral indicating that language may be a barrier to the student's learning, the District will review the student's available academic history, consider any input provided by the parent or guardian, and any input based on the student's performance in school.
3. Students will receive a formal screening for potential placement via testing if: (a) the review of the student's academic history indicates a possible language barrier, (b) a lack of sufficient information on which to judge academic performance and/or the extent to which limited English proficiency may be a barrier to learning, or (c) the student is newly arrived in the United States.
4. Parents and guardians will be notified of identification, assessed proficiency, placement and other information as required by law. Parents and guardians may also withdraw their child from offered supports and services at any time.

#### **B. Assessing English Proficiency**

1. On or before March 1 each year, District staff shall conduct a count of all English language learners (ELL) enrolled in District schools, assess the language proficiency of such students and classify such students by language group, grade level, age and English language proficiency.
2. ELL students shall be assessed to determine their English language proficiency using the Department of Public Instruction (DPI)-approved English proficiency assessment instrument – ACCESS for ELLs®. The assessment shall be administered by an English-as-a-second-language teacher or another licensed staff member designated by the building principal who the principal determines has sufficient training and knowledge to assist with the process. The District may also use information such as the following when assessing a student's English proficiency: prior academic records from within or outside the United States, information on everyday classroom performance, and course grades which, in relation to the student's grade level, indicate that lack of progress is due to limited English language skills.
3. ELL students assessed shall be classified and reclassified as appropriate, according to their English proficiency level as outlined in state rules (Level 1 – Beginning Preproduction through Level 6 – Formerly Limited-English Proficient Now Fully-English Proficient).

4. Student English proficiency assessment records shall be maintained by the District in accordance with state and federal laws and District student records policies and procedures. Reports regarding ELL students shall be made to the DPI as legally required.

**C. Assessing Academic Performance**

Decisions regarding academic performance and assessment shall be made on an individual basis for each ELL student, and information on both academic and English proficiency data shall be documented and considered. Decisions regarding the appropriate approach to assessment, including the planned approach for the student's state-mandated academic assessments, shall normally be made by the classroom teacher and building principal, English as a second language teacher and communicated to the student's parent(s) or guardian.

**D. ELL Students and State Academic Assessments**

1. The results of both state-required tests and alternative assessments shall be used in a manner that is consistent with District policies in making instructional, promotion and graduation decisions. Test results may not be used as the sole criterion in re-classifying an ELL student from a bilingual-bicultural education program or in determining grade promotion, eligibility for courses or programs, eligibility for graduation or eligibility for participation in post-secondary education opportunities. Similarly, exemption of an ELL student from taking a state-required test may also not be used as the sole criterion for making such determinations.
2. The District shall administer a state-required test to an ELL student unless a determination has been made that the results of the test, with allowable accommodations made for the student as needed, will not be a valid and reliable indicator of the student's academic knowledge and skills. Such determinations are to be made on an individualized, case-by-case basis. If an ELL student is exempted from taking a state-required test, he/she shall be administered a DPI-approved alternative assessment.
  - a. Before making decisions regarding state-required academic assessments for any ELL student, the District will first determine if the student has recently arrived in the United States. "Recently arrived" refers to a student that has attended a U.S. school for less than 12 months.
    - (1) A recently arrived ELL student may be exempted from one required administration of the state's reading assessment.
    - (2) Recently arrived students must participate in all other content areas (with or without accommodations).
    - (3) If the District does not assess a recently arrived ELL student on the state's reading/language arts assessment, the District must count the year in which the assessment would have been administered as the first of the three years in which the student may take the state's reading/language arts assessment in an alternative format (see paragraph b in this section, immediately below).
  - b. Except as specified below in b(1) and b(2), students at English proficiency Level 1 or Level 2 as defined by the state English proficiency level standards shall participate in an alternative assessment even if they participate in a state-required test.
    - (1) Students at English proficiency levels 1 or 2 who have attended school in the first grade or any higher grade in the United States, not including Puerto Rico, for three or more full consecutive school years shall participate in academic assessment of reading or English language arts using tests written in English.
    - (2) The District may continue, for no more than two additional consecutive school years, to assess a student described in (1), immediately above, with an alternate assessment, rather than the state-required tests, if the District determines that the student has not reached a level of English language proficiency sufficient

for the tests written in English to yield valid and reliable information about what the student knows and can do. This determination shall be made on a case-by-case basis.

- c. Students at English proficiency levels 3 through 5 as defined by the state English proficiency level standards shall participate in a state-required test but may also participate in an alternative assessment, based upon the District's assessment of the student's overall academic performance and its determination as to whether the alternative assessment and the results obtained from the assessment are likely to be beneficial to the student.
- d. If an ELL student participates in a state-required test, the District shall provide testing accommodations for the student if they are needed. Any accommodations made shall maintain the validity of the test. Testing accommodations may include, but are not limited to, one or more of the following:
  - (1) providing the assistance of a qualified translator to translate instructions or read items from tests that do not assess English language competency;
  - (2) providing small group or individual testing opportunities;
  - (3) providing more practice tests or examples before the actual test is administered;
  - (4) allowing ELL students to use dictionaries or other educational aids while taking the test unless this use would invalidate the test;
  - (5) allowing ELL students as much time as necessary to complete the test; and
  - (6) any other accommodation approved by the DPI.
3. School personnel shall make reasonable efforts to consult with a student's parent or guardian regarding the planned approach to the student's state-required academic assessments.
4. Student test/alternative assessment results shall be communicated to the student's parent or guardian and to the DPI as required by law.

**E. Educational Program Assistance**

1. An ELL student will be provided educational program assistance and/or services as appropriate and necessary to help the student improve his/her English language skills and academic performance. The degree of curricular and instructional modification, type of support or other program services and their duration shall be determined individually, based on student need.

**F. Students Exiting the ELL Program Based on Proficiency**

1. Except in unusual circumstances where the District determines that observations and academic performance demonstrate that a student should maintain his/her Limited English Proficient status, an ELL student will be exited from the ELL program or services when the student either:
  - a. In grades K-12, achieves a 6.0 composite score on the ACCESS for ELLs®;
  - b. In grades 4-12 only, achieves a composite (overall) score of 5.0 or above plus a minimum literacy sub-score of 5.0 or above on the ACCESS for ELLs®; or
  - c. Achieves some other testing/achievement benchmark that meets an established state standard for automatically reclassifying and exiting the student.
2. An ELL student may also be eligible for exiting from the ELL program or services if all of the following conditions are met:

- a. The student has completed fourth grade.
  - b. The student has attained an English level proficiency of level 5, including a composite (overall) score of 5.0 on the ACCESS for ELLs®.
  - c. Two or more additional pieces of evidence demonstrate that the student has become fully English language proficient. Evidence should include demonstrations of grade-level proficiency, without the use of adapted or modified English materials or English learner accommodations on standardized measures such as: state academic content assessments; District-level standardized assessments (e.g., Measures of Academic Progress - MAP), classroom grade-level curriculum derived assessments, and writing samples and assessments such as final or unit exams.
  - d. The student's parent(s) or guardian and teachers agree that language is no longer a barrier to the students' ability to access academic content.
3. Once students have been exited from the ELL program, they shall no longer be tested on their English proficiency or receive state testing accommodations for ELL students. However, the District will continue to monitor the exiting student for two additional years through teacher observation and by documenting adequate progress/classroom performance. If it is determined that the student was exited from the ELL program prematurely, he/she will be placed back in the ELL program and provided appropriate services.

**G. Notices and Other Communications with Parents and Guardians**

District personnel are expected to make reasonable efforts to present formal notices and other information to parents and guardians in an understandable format and in a language parents and guardians can understand. Notices and communications may be provided in the parent's or guardian's primary language (preferred when practical, and required by law in some instances), in English with additional explanation, or via other means that sufficiently convey the required information (e.g., using direct translation assistance if available and if necessary).

**First Reading: April 11, 2016**



**SCHOOL DISTRICT OF PITTSVILLE  
BOARD POLICY**

**INSTRUCTION**

**EDUCATIONAL PROGRAMS  
SPECIAL AND ALTERNATIVE EDUCATION PROGRAMS  
HOME LANGUAGE SURVEY**

342.7 - Exhibit

**[TO BE COMPLETED BY STUDENT'S PARENT OR GUARDIAN]**

To make sure that all students receive the educational services that they need, the law requires school districts to ask questions about students' language backgrounds. The answers to these questions will (1) assist the School District in determining whether a student's proficiency in English may need to be evaluated, and (2) assist the School District in communicating with the home. Thank you for your assistance. Your answers to this survey are used for school purposes only.

**DIRECTIONS: (1) Please fill out a separate Home Language Survey for each child; (2) respond to each question; (3) sign the form; and (4) return the completed form to the school office.**

Student's Name: \_\_\_\_\_ Parent/Guardian Name(s): Please Print \_\_\_\_\_

Student's Date of Birth: \_\_\_\_\_

1. What is the primary language spoken in the student's home, regardless of the language(s) spoken by the student?  
 English       Other Language (Please specify) \_\_\_\_\_
2. What language did your child first learn?  
 English       Other Language (Please specify) \_\_\_\_\_
3. What is the primary language that you use when speaking to your child?  
 English       Other Language (Please specify) \_\_\_\_\_
4. What is the language most often spoken by your child when not at school?  
 English       Other Language (Please specify) \_\_\_\_\_
5. Is there an adult in your home who can read and understand English?  Yes  No  
If not, what language(s) can be read and understood? \_\_\_\_\_
6. When different options are available, in what language would you prefer to receive information from your child's school?  
 English       Other Language (Please specify) \_\_\_\_\_

\_\_\_\_\_  
Parent or Guardian Signature

\_\_\_\_\_  
Date

*If you have questions about this survey, please contact* \_\_\_\_\_.

**First Reading:      April 11, 2016**

# SCHOOL DISTRICT OF PITTSVILLE BOARD POLICY

## STUDENTS

### STUDENT HEALTH AND WELFARE

#### EMERGENCY NURSING SERVICES

453.1

The policies and procedures for Emergency Nursing Services for the Pittsville Public Schools have been developed under the guidelines provided by the Department of Public Instruction.

The Medical Advisor for Emergency Nursing Services will be: *Ministry Medical Group, Inc., 5412 Highway 10 East, Stevens Point, WI 5448, 715-346-524.*

Pittsville Public Schools have contracted the Ministry Medical Group, Inc. in Stevens Point, Wisconsin.

First aid services will be available during the school day and for co-curricular activities. School personnel will be available at each school building.

The Pittsville Ambulance Service will be on call or at school functions to provide emergency health services and transportation when serious emergencies occur. The Pittsville Ambulance Service telephone number is 715-884-6514 or 911.

Equipment and supplies necessary for the emergency first aid service will be requisitioned and purchased by the Pittsville School District.

The First Aid Rooms are designated areas for emergency nursing personnel and supplies. The High School, as well as the Elementary School, shall have designated First Aid Rooms.

First aid kits are available in each of the school's main offices and in the shop and athletic offices. A traveling kit shall also be provided for field trips and co-curricular activities. The first aid kits shall contain necessary emergency supplies. A list of emergency phone numbers shall be with each kit. An inventory of each kit shall be on file in each of the main office first aid rooms. First aid supplies will be obtained from Emergency Nursing Services and restocked during the year as necessary.

There will be in service training devoted to CPR for all the District certified and non-certified full-time employees. A list of those certified in CPR and First Aid will be on file in the District's Administrator's office. Refresher courses will be offered as needed.

All accidents shall be reported to the Building Principal or their designees by the person in charge of the activity when the accident occurred. A log of accidents will be kept by the designated First Aid personnel on the Health Office Visit form (Exhibit A). The form will be filled out by the provider of the service.

All students will have an updated Emergency Contact form filled out for emergency or illness information. The form will be on file in the office of the school attended. Staff will be notified of their location.

When First Aid or CPR is to be given, school personnel are authorized to administer only prudent measures set up in the District's overall Emergency Nursing Policy (Exhibit B).

If a student becomes ill or injured, parents will be notified by the School Office to pick up their child or that they will be taken home. No students will be sent/left home without parental consent. All health-related incidents shall be recorded on the Health Office Visit form (Exhibit A). **Child must be kept home for 24 hours after the fever breaks (medication free) or 24 hours from the last episode of fever or diarrhea.**

Pupils requiring medication at school shall be identified by parents to the Administration. The Administration shall assume the authority for involving designated school personnel in the administration of the medication.

In all instances where prescription and non-prescription medication is needed when a child is attending school, a ~~Parent/Guardian Consent Form for Medication/Clinician's Order for Administration of Prescription Medication~~ an Authorization Release and Indemnification Agreement shall be on file in the school's main offices with required signatures. Consent forms must be updated yearly and are available in the Health Director's office (Exhibit C & C-1).

Non-prescription medication may be administered by First Aid personnel only with written parental consent (Exhibit C). Non-prescription medications administered to students will be recorded on the Health Office Visit form (Exhibit A).

**Prescription** medication must be in properly labeled original containers with dosage instructions. All medications will be kept under lock and key in each Health Director's office. An accurate and confidential system of record keeping will be established for each pupil receiving medication.

There will be an annual review of the Emergency Nursing Services by the Pittsville School District's designated Emergency Nursing Service Coordinator. The coordinator will seek input in his/her evaluation, which will be in writing and filed in the District's Administrator's office, from all personnel involved in emergency first aid services.

*Adopted: May 1, 1998*

*Updated: June 10, 2009*

*Updated: January 9, 2015*

*Updated: May 9, 2016*

## EMERGENCY PROCEDURES FOR PITTSVILLE PUBLIC SCHOOLS

If needed:

1. Call 911
2. Restore and maintain open airway.
3. Restore and maintain breathing.
4. Stop severe bleeding. Quickly apply pressure directly to bleeding site with the cleanest compress available.
5. Restore and maintain circulation.
6. Send for principal or designated personnel as quickly as possible.
7. Notify parents as soon as possible for instructions regarding designated hospital/doctor.
8. In unable to reach parents, follow instructions on emergency card regarding designated hospital/doctor/dentist.

Pittsville Ambulance Service		911
Riverview Hospital		1-715-423-6060
St. Joseph's Hospital		1-715-387-1713
Ministry Medical Group	Jennifer Schwede, RN	1-715-432-6079
Poison Center	Eau Claire	1-715-835-1515
	Madison	1-608-262-3702

9. Complete accident forms and log of injuries as required.

<p><b>HEALTH OFFICE VISIT</b>                  PITTSVILLE ELEMENTARY SCHOOL                  5459 ELEMENTARY AVENUE, SUITE 1                  PITTSVILLE, WI 54466                  715-884-2517</p>		STUDENT NAME _____ GRADE _____ DATE _____
NATURE OF VISIT <input type="checkbox"/> INJURY <input type="checkbox"/> ILLNESS <input type="checkbox"/> OTHER NURSE'S SIGNATURE _____		TIME IN _____ TIME OUT _____
<p><b>REASON FOR VISIT:</b></p> <div style="display: flex; flex-wrap: wrap;"> <div style="width: 33%;"><input type="checkbox"/> ALLERGY</div> <div style="width: 33%;"><input type="checkbox"/> CRAMPS</div> <div style="width: 33%;"><input type="checkbox"/> FEVER</div> <div style="width: 33%;"><input type="checkbox"/> NOSEBLEED</div> <div style="width: 33%;"><input type="checkbox"/> SPLINTER</div> <div style="width: 33%;"><input type="checkbox"/> ASTHMA</div> <div style="width: 33%;"><input type="checkbox"/> CUT/SCRAPE</div> <div style="width: 33%;"><input type="checkbox"/> HEADACHE</div> <div style="width: 33%;"><input type="checkbox"/> POSS. FRACTURE</div> <div style="width: 33%;"><input type="checkbox"/> STOMACHACHE</div> <div style="width: 33%;"><input type="checkbox"/> BRUISE</div> <div style="width: 33%;"><input type="checkbox"/> DENTAL</div> <div style="width: 33%;"><input type="checkbox"/> HEAD INJURY</div> <div style="width: 33%;"><input type="checkbox"/> RASH</div> <div style="width: 33%;"><input type="checkbox"/> BURN</div> <div style="width: 33%;"><input type="checkbox"/> EARACHE</div> <div style="width: 33%;"><input type="checkbox"/> INSECT BITE</div> <div style="width: 33%;"><input type="checkbox"/> ROUTINE MEDICINE/TREATMENT</div> <div style="width: 33%;"><input type="checkbox"/> COLD/COUGH</div> <div style="width: 33%;"><input type="checkbox"/> EYE (L, R)</div> <div style="width: 33%;"><input type="checkbox"/> NAUSEA/VOMITTING</div> <div style="width: 33%;"><input type="checkbox"/> SORE THROAT</div> <div style="width: 33%;"><input type="checkbox"/> OTHER _____</div> </div>		
<p><b>VITAL SIGNS:</b></p> Temp _____ BP _____ P _____ R _____ Other _____		
<p><b>OBSERVATIONS/ADDITIONAL INFORMATION</b></p> _____ _____ _____		
<p><b>INSTRUCTIONS:</b></p> _____ _____		
<p><b>TREATMENT/DISPOSITION:</b></p> <input type="checkbox"/> EMS <input type="checkbox"/> CLEANSED WOUND <input type="checkbox"/> APPLIED BANDAGE <input type="checkbox"/> ICE APPLIED/COLD COMPRESS <input type="checkbox"/> MEDICATION GIVEN <input type="checkbox"/> WARM COMPRESS <input type="checkbox"/> RESTED IN OFFICE <input type="checkbox"/> OTHER _____		<p><b>REMARKS:</b></p> _____ _____ _____ _____

WHITE - OFFICE COPY      GREEN - PARENT'S COPY

### BASIC EMERGENCY CARE FOR ANY INJURY OR ILLNESS

There are three situations which may be life-threatening and require your prompt attention:

**Absence of Breathing**  
**Severe Bleeding**  
**Absence of Adequate Circulation**

- Dial 911
- Do not panic.
- The victim should either sit or lie down – even minor injuries cause fainting.
- If severe injury is suspected, do not move victim.
- Keep victim warm.
- Reassure the victim – be optimistic – fear and pain can worsen the victim's condition.
- Determine the seriousness of the illness or injury.
- Administer first aid according to approved procedures.
- Never leave the seriously ill or injured unattended.
- Contact the parents as soon as possible. If parents cannot be reached, or in case of extreme emergency, follow the instructions on the emergency card.
- Complete required accident forms.

Pittsville Public School District  
20\_\_\_\_-20\_\_\_\_ School Year

**Prescription Medication**  
Order and Administration and Authorization  
Release and Indemnification Agreement

Student: \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Grade/Teacher: \_\_\_\_\_

**PART I—TO BE COMPLETED BY THE LICENSED HEALTHCARE PROVIDER (LHP – MD, DO, or Nurse Practitioner)**

List Medication allergies:  none

*Please administer the following medications according to the specifications indicated:*

Name <small>*include emergency medications</small>	Dose	Route	Time(s)	Reason for Use, Side Effects, &/or Special Instructions	End Date

**SELF-CARRY/SELF-ADMINISTRATION OF EMERGENCY MEDICATION AUTHORIZATION/APPROVAL\*must be ordered above\***

*Self-carry/self-administration of inhalers or EpiPen must be authorized by the prescriber and parent as well as approved by the school nurse after appropriate demonstration is observed.*

This student has demonstrated appropriate knowledge and competency and may self-carry/self-administer the following emergency medication(s):  EpiPen (as ordered)  Inhaler: \_\_\_\_\_

Ordering Provider Name (PRINT): \_\_\_\_\_ Phone: \_\_\_\_\_

Location: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**PART II—TO BE COMPLETED BY THE PARENT/GUARDIAN**

*I hereby request and authorize Pittsville Public School District (PPSD) principal-designated personnel to administer prescribed medication as directed by the licensed healthcare provider (LHP) indicated in Part I above. I agree to release, indemnify, and hold harmless PPSD and any of their officers, staff members, or agents from lawsuit, claim, demand, or action against them for administering prescribed medication to this student, provided staff are following the physician's order as written in Part I. I have read the PPSD medication policy and protocol as outlined on the back of this form and assume the responsibilities as required.*

My child may self-carry and/or self-administer the prescribed emergency medication(s)  Yes  No Initials: \_\_\_\_\_

Parent/Guardian Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Phone: (H) \_\_\_\_\_ (C) \_\_\_\_\_ (W) \_\_\_\_\_

**PART III—TO BE COMPLETED BY THE SCHOOL NURSE**

- Parts I and II above are complete (separate provider prescription may be attached)
- Prescription medication in original container with the pharmacy label intact and readable
- Prescription medication label and Healthcare Provider order are consistent
- Student demonstrates appropriate knowledge and competency to self-carry/self administer designated medication  
Emergency medication location:  health office  locker  back-pack  N/A
- Entered into Skyward: initials \_\_\_\_\_ date \_\_\_\_\_

School Nurse Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Pittsville Public School District**  
20\_\_ - 20\_\_ School Year

**Non-Prescription  
Medication Administration Authorization  
Release and Indemnification Agreement**

Student:

Date of Birth:

Grade:

**PART I—TO BE COMPLETED BY THE PARENT/GUARDIAN**

Please administer the following non-prescription medication(s) according to the specifications indicated below. I understand a Prescription Medication Order and Administration Authorization is required for any non-prescription medication that needs to be given **for more than 5 consecutive days**.

List Medication Allergies:  none

Medication Name <i>*Per pkg dosing = manufacturer's recommendations</i>	Dose	Route	Time(s)	Reason for Use and Special Instructions	End Date
<input type="checkbox"/> Acetaminophen (Tylenol): circle one • Children's • Junior's • Adult	<input type="checkbox"/> per pkg* <input type="checkbox"/> other:	oral	<input type="checkbox"/> per pkg* <input type="checkbox"/> other:	<input type="checkbox"/> pain or fever <input type="checkbox"/> other:	<input type="checkbox"/> end of school year <input type="checkbox"/> other:
<input type="checkbox"/> Ibuprofen (Advil, Motrin): circle one • Children's • Junior's • Adult	<input type="checkbox"/> per pkg* <input type="checkbox"/> other:	oral	<input type="checkbox"/> per pkg* <input type="checkbox"/> other:	<input type="checkbox"/> pain or fever <input type="checkbox"/> other:	<input type="checkbox"/> end of school year <input type="checkbox"/> other:
<input type="checkbox"/> Diphenhydramine (Benadryl)	<input type="checkbox"/> per pkg* <input type="checkbox"/> other:	oral	<input type="checkbox"/> per pkg* <input type="checkbox"/> other:	<input type="checkbox"/> hives, itching <input type="checkbox"/> other:	<input type="checkbox"/> end of school year <input type="checkbox"/> other:
<input type="checkbox"/> Cough Drops	<input type="checkbox"/> per pkg* <input type="checkbox"/> other:	oral	<input type="checkbox"/> per pkg* <input type="checkbox"/> other:	<input type="checkbox"/> cough <input type="checkbox"/> other:	<input type="checkbox"/> end of school year <input type="checkbox"/> other:
<input type="checkbox"/> Other:					

I hereby request and authorize Pittsville Public School District (PPSD) principal-designated personnel to administer the non-prescribed medication indicated above to my child. I agree to release, indemnify, and hold harmless PPSD and any of their officers, staff members, or agents from lawsuit, claim, demand, or action against them for administering this medication to my child, provided staff are following the specifications as indicated. I have read the PPSD medication policy and protocol as outlined on the back of this form and assume the responsibilities as required.

**Parent/Guardian Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Phone: (H)** \_\_\_\_\_ **(C)** \_\_\_\_\_ **(W)** \_\_\_\_\_

**PART II—TO BE COMPLETED BY THE SCHOOL NURSE**

- Parent/Guardian consent signed and dated
- Non-prescription medication in original container with the manufacturer's label intact and readable
- Non-prescription medication label and parent/guardian request are consistent
- Entered in Skyward: initials \_\_\_\_\_ date \_\_\_\_\_

School Nurse Signature: \_\_\_\_\_ Date: \_\_\_\_\_



**SCHOOL DISTRICT OF PITTSVILLE  
BOARD POLICY**

## **FISCAL MANAGEMENT AND INTERNAL CONTROLS**

### **INTERNAL CONTROLS – ALL TYPES OF FUNDS**

660

The District's 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 District's receipt, holding, and expenditure of public funds for authorized and appropriate public purposes. More specifically, internal controls help the District 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 District expenditures are sufficiently necessary, reasonable, authorized, allocable (e.g., to the appropriate accounting funds, budget line items, and/or revenue sources), and documented.

The District Administrator and Director of Business Services have primary and overall administrative responsibility to ensure that reasonable and sufficient internal financial controls are identified, implemented, monitored, and enforced. The School Board expects the District'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 District Administrator 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. District accounting procedures shall identify all federal funds received and expended and the specific federal programs under which they were received.

The District Administrator, Director of Business Services, and Grant Coordinator have responsibilities related to internal controls include administrative supervision of the District's internal control over compliance requirements for federal awards. The Board's expectation is that District 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 District 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 District maintains adequate written procedures governing procurement, payment, and allowability of costs.

**SCHOOL BOARD POLICY #660**  
**INTERNAL CONTROLS – ALL TYPES OF FUNDS**

Examples of specific federal compliance issues that the District Administrator, Director of Business Services, and Grant Coordinator are charged with overseeing include (1) verifying and ensuring that the District 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 District’s maintenance of effort requirements in connection with specific federal awards; (4) ensuring that the District 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 District 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.

**Legal References:**

**Wisconsin Statutes**

[Section 115.28\(13\)](#) [uniform financial accounting system for school districts]  
[Section 120.13\(6\)](#) [school board power to apply for and receive federal aid]  
[Section 120.14](#) [annual school district audit required]

**State Guidance**

[Department of Public Instruction School District Audit Manual Index](#)  
[Wisconsin Uniform Financial Accounting Requirements \(WUFAR\)](#)

**Federal Law**

[2 C.F.R. §200.61](#) [definition of “internal controls” under the federal Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance)]  
[2 C.F.R. §200.62](#) [definition of “internal control over compliance requirements for Federal awards” under the Uniform Guidance]  
[2 C.F.R. §200.302](#) [school district financial management requirements established under the federal Uniform Guidance; note various cross-references in this section]  
[2 C.F.R. §200.303](#) [school district internal control requirements established under the federal Uniform Guidance]  
[2 C.F.R. part 200 subpt. E](#) [cost principles and allowable costs under the federal Uniform Guidance]  
[2 C.F.R. part 200 subpt. F](#) [audit requirements under the federal Uniform Guidance]  
[34 C.F.R. part 75](#) [U.S. Department of Education regulations for direct grant programs]  
[34 C.F.R. part 76](#) [U.S. Department of Education regulations for state-administered programs]  
[34 C.F.R. part 77](#) [definitions applicable to federal Education Department General Administrative Regulations (EDGAR)]

**Cross References:**

*Policy 673 – Payment Procedures (Other than Salaries and Wages)*  
*Policy 881.1 – Special Activity Funds Management*

*1st Reading: April 11, 2016*  
*2<sup>nd</sup> Reading and Approval:*

# SCHOOL DISTRICT OF PITTSVILLE BOARD POLICY

## PURCHASING

672

### AUTHORITY TO MAKE PURCHASES AND ENTER INTO PROCUREMENT CONTRACTS

The procurement and purchasing process generally involves (1) budgeting and other planning for expenditures, (2) evaluating needs and identifying general options that would address a need, (3) selecting a method of procurement and following other procurement procedures for a specific purchase or contract, (4) making an actual purchase or entering into a binding procurement-related contract on behalf of the District, and (5) authorizing and making an actual disbursement of funds from the District treasury in order to pay for a purchase or contractual procurement of services, supplies, equipment, or other property.

Assuming an authorized method of procurement has been followed (as established by applicable law and under separate District policies and procedures), this policy focuses on the authority to act as a District purchasing agent by making specific purchases and/or entering into procurement contracts on behalf of the District.

Prior to taking any action that binds the District to an expenditure of funds, the administration shall obtain the School Board's approval of any specific purchase or any procurement contract if any one or more of the following circumstances applies:

1. The transaction involves the District's purchase, lease, or other acquisition of real estate, a building/facility, or some other interest in real estate (such as an easement). Such transactions also generally require authorization by a vote of the electors at an annual or special meeting.
2. Except as otherwise directed or authorized by the Board and except in a situation involving a public exigency or emergency where the District Administrator and Director of Business Services approves an emergency procurement and promptly notifies the Board of his or her emergency action.

The School Board requires advance board approval for these specific procurements/purchasing decisions:

1. Any individual procurement transaction or contract for the procurement of goods or services in excess of \$5,000, even where the transaction is accounted for in the appropriations found within the current Board-approved budget. This paragraph applies to a discretionary choice to exercise a renewal or extension option found in an existing contracting arrangement, but it does not require additional authorization to make an installment or other periodic payment that is due and payable for a disbursement that was previously approved in the aggregate by the Board.
2. The entering of any contract involving construction or remodeling of District facilities, where the specific project has not been authorized by the Board in advance; except that the District Administrator, Director of Business Services or the Supervisor who has budget management authority within the budget area may authorize small maintenance and repair projects of less than \$5,000, if the expenditure is sufficiently accounted for within a contingency-type appropriation of the current Board-approved budget.
3. Any procurement in excess of \$5,000 that is obtained through competitive bidding or through a competitive request for proposal process. At least three bids are required.
4. Any unplanned procurement in excess of \$5,000 that the administration determines will be highly likely to require the Board – either immediately or prior to the close of the budget year – to make a budget amendment that, by statute, must be approved by 2/3 of the entire membership of the Board.
5. Any procurement that the administration proposes to pay for by using an unassigned or assigned fund balance or that would require the District to change the designated purpose of any committed fund balance amounts.
6. Any purchase of textbooks that have not previously been adopted by the Board for use in the curriculum.
7. Any individual procurement transaction in excess of \$5,000 that involves entering into a contract proposed or drafted by a vendor/provider that is other than a standard consumer purchase order.
8. Any individual procurement transaction in which the vendor/provider is requesting that the District execute a contract in which the District would be expressly waiving legal claims or remedies, agreeing to name a non-District party as an additional insured, and/or agreeing to indemnify or hold harmless any non-District party.

**AUTHORITY TO MAKE PURCHASES AND ENTER INTO PROCUREMENT CONTRACTS**

For all procurement transactions that do not require specific, advance Board approval under this policy and for which the Board has not provided any more specific direction, the District Administrator, Director of Business Services, or the Supervisor who has budget maintenance within a particular budget area may make a final purchase, execute a binding procurement contract that has been reviewed and approved by the District Administrator, or authorize a designee to make such a purchase or execute such a contract on behalf of the District.

The Board recognizes that the District’s procurement agents have authority under this policy to make certain purchases and to enter into certain procurement contracts on behalf of the District without obtaining specific, advance approval from the Board – including especially those relatively routine purchases that are within the budget appropriations that have been previously approved by the Board. Nonetheless, the Board also expressly encourages the administration to present any procurement decision for specific Board approval whenever the administration determines that either (1) the procurement decision is particularly important or non-routine, or (2) it would otherwise be in the best interests of the District for the Board to either approve the transaction or give other specific direction to the administration regarding the transaction. Further, the authority granted to the administration and to District purchasing agents under this policy does not exempt such individuals from being evaluated on their exercise of sound judgment in connection with the use of such authority.

For all purchasing and procurement transactions that are brought to the Board for advance approval, the administration shall clearly identify the key terms of the transaction and, where appropriate, make a recommendation among any options that are presented. Where the administration has relied on a sole-source procurement exception and is seeking Board approval of a transaction, the administration shall be prepared to identify for the Board the reason that sole-source procurement was used and the reason the administration believes that the price and other key terms of the proposed transaction are reasonable.

For purposes of this policy, the purchasing or contractual procurement of supplies, equipment, and other property includes, but is not necessarily limited to, rental or leasing arrangements, licensing, purchases involving the transfer of ownership, and the purchase or acquisition of intangible property such as insurance coverage. The purchasing or contractual procurement of services does not include employment.

No order check, share draft, or other draft or actual disbursement of District funds can be made from the District treasury and the depositories in which the treasury’s funds are maintained unless the money so disbursed has been lawfully appropriated, the proper payment voucher has been filed, and the Board or an annual/ special meeting of the electors has directed the disbursement (draw order) from the treasury.

**Legal References:**

**Wisconsin Statutes**

- Section 66.0135 [contracts and orders, receipt of invoices, and payments]
- Section 66.0607 [withdrawal or disbursement from local treasury]
- Section 120.10 [powers of the annual meeting, including authorizing or directing the district to purchase/provide certain property or services]
- Section 120.16 [school district treasurer duties, including procedures for disbursements from treasury and funds transfers]

**Federal Law**

- 2 C.F.R. Part 200 Subpt. D [post-award requirements under the federal Uniform Guidance]
- 2 C.F.R. §200.318 [general standards for procurement supported by federal funds]
- 2 C.F.R. §200.319 [written procurement standards required]

**Cross References:**

Policy 672.2 – Standards of Conduct in Purchasing & Contracting

*1st Reading: April 11, 2016*

*2nd Reading and Approval:*

**SCHOOL DISTRICT OF PITTSVILLE  
BOARD POLICY**

## **STANDARDS OF CONDUCT IN PURCHASING AND CONTRACTING**

### **CONFLICT OF INTEREST**

672.2

The School Board is committed to purchasing and contracting processes that promote the responsible stewardship and expenditure of District funds (inclusive of local, state, federal, and all other sources), including the avoidance of conflicts of interest. Accordingly, in addition to all other applicable restrictions independently established by law or separately established by the District, the Board:

1. Directs the administration, through its procedures and evaluative processes, to consistently enforce the standards of conduct imposed by the Board and by related state and federal laws, including, as examples, the state's Code of Ethics for Local Government Officials ("Code"), the state's prohibitions against misconduct in office, the state's prohibitions against private interests in public contracts, and the federal government's minimum standards of conduct connected to any District officer's, employee's, or agent's participation in purchasing and contracting activities that involve the use of federal funds.
2. Extends the application of the state's Code such that the provisions of the Code (as well as its applicable exceptions and exclusions) shall be enforced as District standards of conduct with respect to all District employees who are involved in District purchasing and contracting activities in other than a purely ministerial capacity. Further, in applying and enforcing the various provisions of the Code as local employment standards in connection with such activities, the following broader definitions shall be used in place of the narrower definitions found in the state statutes:
  - a. "Immediate family" means all of the following: spouse, and parents thereof; children, and spouses thereof; parents, and spouses thereof; and siblings, and spouses thereof; financial dependents as identified in the state Code; or another adult sharing the same household as the employee of the District.
  - b. An organization with which the employee is "associated" means any organization with which the employee or his or her spouse is associated as an owner, partner, or director, as further defined by the Code; any organization for which the employee or his or her spouse serves as an authorized representative or agent; or any organization which employs or is about to employ either the District employee or any member of the employee's immediate family.
3. Requires any employee of the District to disclose to the District Administrator, clearly and as early in the contracting process as practical, the employee's desire to pursue in his or her private capacity (e.g., via bidding, negotiation, etc.) any contract with the District (a) in which the employee has a direct or indirect private pecuniary interest, and (b) that, but for the amount of the contract being below the dollar/cost threshold of the applicable criminal statute that prohibits private interests in public contracts, the employee would otherwise be criminally prohibited from pursuing even in his or her private capacity.
4. Prohibits any authorized agent of the District from participating in the submission of a bid or proposal for any District procurement or contracting decision that is to be made through the solicitation, receipt, and evaluation of competitive bids or competitive requests for proposals when the same agent's designated role on behalf of the District included advising the District regarding the same project's specifications, requirements, statements of work, or invitations for bids or requests for proposals. *{In 2 C.F.R. §200.319, the federal Uniform Guidance imposes a very similar restriction that is generally non-waivable in the context of competitive procurement that involves the use of federal funds that are subject to the Uniform Guidance.}*

As to any District-established standard of conduct applicable to District purchasing and contracting activities where the standard exceeds the minimum restrictions and prohibitions imposed by state or federal law, the Board may, at its discretion, make an exception to the local standard through policy or via other official action. Any employee or authorized agent who wishes to request such an exception shall contact the District Administrator and disclose the specific circumstances relevant to the request.

Even where no law or District policy, regulation, or procedure requires an officer, agent, or employee of the District to take a specific action (or to refrain from specific conduct), the Board expects all officers, agents, and employees to use sound

judgment in identifying possible conflicts of interest or other situations giving rise to a reasonable perception of impropriety that may detract from public confidence in the District's purchasing and contracting activities. Upon identifying such situations, the officer, agent, or employee should consult with the Board or administration as necessary and determine a reasonable course of action. Examples of potential resolutions to such situations include making express disclosures (e.g., of particular familial or social relationships) and/or abstaining from participation in particular District processes and transactions.

**Consequences for Violations**

Any officer, employee, or agent of the District who violates the standards of conduct applicable to participation in District purchasing and contracting activities, as established by the Board or by applicable law, is subject to referral to law enforcement when the conduct is independently subject to possible legal prosecution. In addition:

- A Board member who violates any standards of conduct established by state or federal law is further subject to censure or other disciplinary sanction that is within the authority of the Board itself, and may also be subject to an action for removal from public office by the courts.
- Employees are further subject to possible disciplinary action, up to and including termination from employment.
- A non-employee agent of the District is further subject to termination of his or her authority to act as an authorized agent of the District.

A current or prospective vendor or contractor of the District who offers or provides gifts, favors, or gratuities to any officer, agent, or employee of the District that would constitute a violation of this policy or any applicable law is subject to possible disqualification as a future vendor or contractor of the District. The District will follow the current Internal Revenue Service regulations on de minimis gifts.

In setting forth such possible consequences, the Board neither absolves any officer, employee, or agent of the District from any other individual liability that may accrue to such representative of the District nor disclaims or waives any of the Board's or District's rights to void or terminate agreements or to pursue any other lawful claims or remedies.

**Legal References:**

**Wisconsin Statutes**

- [Section 19.42](#) [statutory definitions related to the code of ethics for local government officials]
- [Section 19.59](#) [ethical standards for local government officials]
- [Section 946.12](#) [misconduct in public office]
- [Section 946.13](#) [private interests in public contracts prohibited]

**Federal Law**

- [2 C.F.R. §200.318](#) [uniform guidance related to acceptance and use of federal funds by non-federal entities; written standards of conduct required]
- [2 C.F.R. §200.319](#) [uniform guidance related to ensuring objective contractor performance and eliminating unfair competitive advantage]

**Cross References:**

Policy – 672 – Authority to Make Purchases & Enter into Procurement Contracts

*1st Reading: April 11, 2016*

*2nd Reading and Approval:*



**SCHOOL DISTRICT OF PITTSVILLE  
BOARD POLICY**

## **FISCAL ACCOUNTING AND REPORTING**

### **MANAGEMENT OF CAPITAL ASSETS**

683

The District's capital assets include, but are not necessarily limited to, land, land improvements, buildings, building improvements, and infrastructure, as well as vehicles and certain machinery, equipment, software, works of art, and other tangible or intangible assets that are used in operations and that have initial useful lives extending beyond one fiscal year. Capital assets also include certain improvements, modifications, replacements, or renovations to capital assets that materially increase their value or useful life. The School Board's expectation for the District's capital asset management and accounting process is to ensure that the District's procedures are sufficiently formalized and implemented to allow for adequate financial reporting, as assessed by the District's auditors.

The District Administrator or Director of Business Services, in consultation with the District's financial auditors, shall be responsible for establishing a written schedule of capitalization thresholds applicable to particular capital asset classes. Subject to the expectation that the schedule shall be structured to capture at least 80% of the value of the District's total assets, the threshold established for single items within any of the asset classes need not be less than \$5,000.

Capital assets having an acquisition cost (or other relevant valuation) above the capitalization threshold of the applicable asset class shall be valued, inventoried, depreciated for financial accounting purposes when appropriate, and regularly tracked over time through the point of retirement, sale, or other disposition.

District procedures related to capital asset management shall also account for the appropriate identification, recording, and tracking of capital assets that are acquired using (1) federal funds, (2) capital borrowing, or (3) referendum funds that are subject to specific restrictions on use.

Nothing in this policy prevents the District from otherwise inventorying (recording, counting, and tracking) supplies, equipment, and other items that are not capitalized and depreciated for financial reporting purposes. Further, even if not capitalized, the District shall inventory the following capital assets:

1. Computing devices, computer peripherals, and any instructional technology capital assets with an individual item value in excess of \$5,000;
2. Furniture;
3. Other non-capitalized items when required by law or by the terms of any grant or contract.

#### **Legal References:**

##### **Wisconsin Statutes**

Section 120.14 [annual school district audit required]

##### **State Guidance**

Department of Public Instruction School District Audit Manual Index

Wisconsin Uniform Financial Accounting Requirements (WUFAR)

Governmental Accounting Standards Board – GASB Statement No. 34

##### **Federal Law**

2 C.F.R. §200.33

[definition of “equipment” tied to local capitalization threshold within the federal Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance)]

2 C.F.R. §200.94

[definition of “supplies” tied to local capitalization threshold within the federal Uniform Guidance]



# SCHOOL DISTRICT OF PITTSVILLE BOARD POLICY

## SCHOOL COMMUNITY RELATIONS

### RECORDS MANAGEMENT AND RETENTION

823.1

The District has a responsibility to retain records in compliance with relevant state and federal laws. The School Board has adopted the [\*Wisconsin Records Retention Schedule for School Districts\*](#) as published by the Department of Public Instruction. Accordingly, District records covered by that Schedule should be retained for at least the period of time outlined therein, subject to any local modifications to the Schedule that have been adopted by the District and approved at the state level (available for review in the District Office).

Student records are maintained as required by applicable state and federal laws and as further detailed in the Schedule and in the District's student records policies and procedures.

In the event a certain record has no other applicable retention period established by, or pursuant to, the Schedule or other applicable law, the District will retain the record for not less than 7 years and follow any applicable notice procedures prior to destruction.

The following are important exceptions to the District's standard records retention and destruction schedules, policies, and practices:

- **Litigation Holds:** When appropriate (e.g., due to imminent litigation, the receipt of a subpoena, the receipt of a formal notice of claim, pending litigation and related appeals, notice of an investigation by or formal proceedings in a state or federal agency, etc.), the District will initiate a litigation-related hold for the purpose of identifying, retaining, and preserving potentially relevant records (including electronically stored information) and other evidence. The District shall maintain records that become subject to a litigation hold for the longer of (1) the normal retention period for the record; or (2) the date on which the litigation hold is released.
- **Pending Requests for Access to Public Records:** Upon the receipt of a request for access to public records, the District's legal custodian of records shall take steps intended to prevent the destruction of potentially responsive records (including responsive records that the custodian may determine should not be released). The District shall maintain such potentially responsive records for the longer of (1) the normal retention period for the record; or (2) at least 60 days (excluding weekends and legal holidays) after an unchallenged denial of a request or after any request-related litigation is complete.
- **School District Audits:** Records necessary for any audit conducted at the direction of the Board or with notice from a state or federal authority shall be maintained until the later of (1) the completion of the audit; or (2) the end of the normal retention period.

The District Administrator, acting in cooperation with and pursuant to the direction of District legal counsel where applicable, shall have primary responsibility for initiating and ending a litigation hold, the preservation of records due to a pending public records matter, or the special preservation of District records under similar circumstances. Under any of these circumstances, the District Administrator or his/her designee shall initiate prompt communication to the Board, relevant District staff, and any relevant third parties (e.g., contractors holding certain records) regarding the scope of the matter and the procedures that are to be followed.

The District Administrator is responsible for overseeing the creation and implementation of rules and operating procedures that further govern records management in the District, including the safekeeping of District records, the

protection of personal privacy of record subjects, and maintaining the District's capacity to appropriately respond to requests for access to records. Records management protocols shall include means for informing employees who are involved in collecting, maintaining, using, providing access to, sharing, or archiving personally-identifiable information of their duties and responsibilities relating to protecting the personal privacy of record subjects.

**Legal References:**

**Wisconsin Statutes**

<a href="#">Section 19.21</a>	[custody and delivery of official property and records]
<a href="#">Section 19.21(6)</a>	[school district records retention; destruction of obsolete records]
<a href="#">Section 19.35(5)</a>	[holding records related to a pending public records request]
<a href="#">Section 19.345</a>	[time computations under the public records law]
<a href="#">Section 19.65</a>	[rules of conduct and employee training]
<a href="#">Section 118.125</a>	[student records]
<a href="#">Chapters 801 thru 809</a>	[Wisconsin civil procedure]

**Wisconsin Administrative Code**

<a href="#">Adm 12</a>	[electronic records management; standards and requirements]
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**Federal Laws and Rules**

<a href="#">Family Educational Rights and Privacy Act</a>	[federal student records law]
<a href="#">F.R.C.P.</a>	[Federal Rules of Civil Procedure]

*1st Reading: April 11, 2016*

*2nd Reading and Adoption:*

**SCHOOL DISTRICT OF PITTSVILLE  
BOARD POLICY**

## **RELATIONS WITH COMMUNITY ORGANIZATION**

### **DISTRICT SUPPORT ORGANIZATIONS AND CLUBS & GRANT COMMITTEES**

#### **SPECIAL ACTIVITY FUNDS MANAGEMENT**

881.1

The Board of Education appreciates the efforts of all organizations/clubs whose objectives are to enhance the educational experiences of District students, to help meet educational needs of students, and/or provide extra educational benefits not provided for, at the time, by the Board.

The Board recognized that school-related organizations/clubs are channels through which school personnel, parents, and students may discuss educational concerns, problems, and needs and work together toward solutions.

The District Administrator shall review the objectives of each organization/club to determine that relevant educational needs are being addressed. Each organization/club shall work within the appropriate school setting and in cooperation with the Principal and other staff members.

All funds raised by special activity student classes, clubs, or organization shall be under the control of the Board and shall be managed in accordance with sound budgetary and accounting procedures, if the organization/club is not its own separate tax reporting entity.

Special activity funds shall be:

1. Deposited in the School District account after being received by the District Administrative Assistant.
2. Accounted for in the Agency Fund.
3. Audited annually along with other School District funds.

Specific funds management procedures shall be developed by the Administration which provide for the collection, documentation, and disbursement of activity funds by classes, clubs, and organizations.

The Principals shall be responsible for supervising the management of special activity funds in his/her building.

#### **Guidelines**

1. Each special activity class, club, or organization shall be assigned a faculty advisor by the Principal who will be responsible to the Principal. *The class, organization or club shall submit an annual budget to the District Office by March 15<sup>th</sup> of each year.*
2. The special activity class, club, or organization treasurer and faculty advisor will be responsible to the Principal for the following:
  - a. Documenting the collection and disbursement of all activity funds.
  - b. Turning all funds and documentation over to the District Office as soon as possible.
3. The collection or raising of funds by special activity classes, clubs, or organizations must have the approval of the Principal. Funds shall be deposited in the School District account after being received by the Board Treasurer. Any interest earned on the deposits shall be credited to each account based on its month end balance.
4. Disbursement of special activity class, club, and organization funds may be made only with the approval of the faculty advisor and the Principal. Proper documentation of vouchers or receipts must accompany each disbursement. The District Administrator shall be kept informed of special activity class, club, or organization funds on a regular basis.
5. Complete records relating to special activity class, club, or organization funds will be submitted at the end of each school year to the Board through the District Administrator. An audit of all special activity class, club, or organization funds will be made at the same time as the annual audit of school funds.

**SCHOOL BOARD POLICY #881.1  
SPECIAL ACTIVITY FUNDS MANAGEMENT**

6. At the end of the school year, all balances of special activity class, club, or organization funds will be carried over to the next school year.
7. No special activity club or organization shall be allowed to operate with a negative balance. Special exceptions may be made with the approval of the Principal based on a reasonable expectation that such negative balance is a temporary condition that will be corrected by incoming receipts.
8. If an account has had no activity for twelve (12) months, the account shall be considered inactive.
9. Misappropriation of activity funds, which includes theft or any other misuse of funds, will result in discipline up to and including suspension, expulsion, and/or termination.
10. Monies received via grant must be disbursed in accordance to the grant's guidelines.

**Inactive Accounts**

Inactive accounts may develop when an organization disbands or the reason for a special purpose account no longer exists. In the event an inactive account develops, the disbanding organization or the sponsor of a special purpose account shall present a plan for dissemination of the account in writing. The following guidelines shall be used when closing inactive accounts.

1. The special activity organization, class, or club should be encouraged to close out the account through expending the funds in line with the purpose of the account and the organizational objectives.
2. If the special activity organization, class, or club fails to make arrangements to close out the account or is unable to dispose of the funds prior to the end of the fiscal year, the fund balance will be absorbed by the Student Council of the Elementary, Junior, or Senior High School.
3. If the source of funds in an inactive account are grant related, these monies must be spent in accordance with the grant guidelines and every effort must be made to do so.

**Legal Reference:**

**Wisconsin Statutes**

***Section 66.0607 (withdrawal or disbursement from local treasury)***

***Section 118.27 (acceptance of gifts and grants)***

***Section 120.12(1) (board duty to provide for the possession, care, control and management of the property and affairs of the district)***

***Section 120.14(1) (audit of school district funds)***

***Section 120.16(2) (board treasurer duty, account for extracurricular activities funds)***

***Section 881.01 (trust fund management; prudent investment rule)***

**Cross Reference**

**662.1 Student Activity Funds Management**

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