



# International American Education Federation, Inc., d/b/a International Leadership of Texas

## September 16, 2020 Regular Board Meeting

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### **Date and Time**

Wednesday September 16, 2020 at 6:15 PM CDT

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### **Meeting Notice & Mission Statement**

In compliance with the Texas Open Meetings Act, the Texas Government Code, Chapter 551, timely public advance written notice (at least 72 hours before the scheduled time of the meeting) is given of the subjects to be considered by the Board of Directors of International Leadership of Texas (the "Board") and the Board will convene a Regular Open Meeting of the Board of Directors of International Leadership of Texas on the date and time set forth herein.

### **Special Notice: Public Meetings at Headquarters are Suspended Until Further Notice:**

International Leadership of Texas Board of Directors will be holding its regularly scheduled public board meeting at the date and time noticed above. Members of the public will be able to watch the meeting via the link <https://zoom.us/j/801651349> or by a link that will be posted on the ILTexas.org website (click the button "Board Meetings" to view any updates to this Notice).

If you would like to sign up to speak at the meeting, please send your name to [board@iltexas.org](mailto:board@iltexas.org), 24-Hours in advance of the noticed Meeting time so that we will be able to promote you to a panelist, which will allow you to speak with our board members.

It normally is the intent of the Board to have a quorum physically present at the above address and to allow any Board members not physically present to participate by live two-way video and audio feed in accordance with the Texas Open Meetings Act. However, due to the COVID-19 Coronavirus Pandemic and the governmental and administrative responses to that Pandemic, the Board intends to conduct the Meeting via videoconference. A quorum of the Board will not be physically present at the usual Headquarters address. Neither will the presiding officer physically be present there. Nevertheless, the Meeting will be open to the public. Every effort will be made to facilitate public viewing of the Meeting while it is in progress via live video feed and, subject to limitations of the technology and logistics, to allow the usual opportunities for those who wish to speak to do so. Please access this Agenda via the ILTexas website as the time of the Meeting approaches, in order to find any additional information or updated links concerning the Meeting.

The Board hereby certifies that this notice was posted on a bulletin board or on something akin thereto or at a place readily accessible and convenient to the public at 1820 N. Glenville Dr., #100, Richardson, TX 75081, as well as online at [www.ILTexas.org](http://www.ILTexas.org). The items on this Agenda may be taken in any order. The mission of ILTexas is to prepare students for exceptional leadership roles in the international community by emphasizing servant leadership, mastering the English, Spanish, and Chinese languages, and strengthening the mind, body and character.

/s/ Finn Simmens, For ILTexas' Board

## Agenda

	Purpose	Presenter	Time
<b>I. Opening Items</b>			<b>6:15 PM</b>
Opening Items			
<b>A.</b> Record Attendance and Guests			
<b>B.</b> Call the Meeting to Order			
<b>II. Public Speakers</b>			
Board Services			
<b>A.</b> Guests who spoke, if any	FYI		
<b>III. Approve Minutes of Prior Meetings</b>			
<b>A.</b> APPROVE MINUTES OF AUGUST 19, 2020 REGULAR MEETING	Approve Minutes		
Approve minutes for August 19, 2020 Regular Board Meeting on August 19, 2020			
<b>B.</b> APPROVE MINUTES OF AUGUST 27, 2020 SPECIAL BOARD MEETING	Approve Minutes		
Approve minutes for August 27, 2020 Special Board Meeting on August 27, 2020			
<b>IV. Executive Session</b>			
<b>A.</b> AUTHORIZATION	FYI		
Closed Session for Any and All Reasons Permissible by Texas Law, including, but not limited to, Texas Government Code Sections 551.071, 551.072, 551.073, 551.074, 551.075, 551.076, 551.082, 551.083, 551.084, pertaining to any item listed on this agenda, as permitted by applicable law.			
<b>V. Superintendent-CEO Report and Information Items</b>			
<b>A.</b> SUPERINTENDENT-CEO REPORT	FYI	Eddie Conger	
<b>B.</b> SCHOOL LEADERSHIP REPORT	FYI	Dr. Thomas Seaberry	
<b>C.</b> CHIEF ACADEMIC OFFICER REPORT	FYI	Dr. Laura Carrasco	
<b>D.</b> CHIEF ADMINISTRATIVE OFFICER REPORT	FYI	Jerry McCreight	
<b>VI. Consent Agenda</b>			
<b>A.</b> VOTE ON CONSENT AGENDA ITEMS	Vote		
1. CONSIDER/ACT ON REVISIONS TO TITLE IX POLICY: Discuss/Take Action to approve Approve revisions to Title IX policy reflecting new federal requirements.			
2. CONSIDER/ACT ON FOOD SERVICE CONFLICT OF INTEREST POLICY: Discuss/Take action to Approve Food Service Conflict of Interest Policy as required by Texas Department of Agriculture.			
3. CONSIDER/ACT TO APPROVE 2020-2021 DATA QUALITY MANUAL: Discuss/Take Action to approve 2020-2021 Data Quality Manual (PEIMS Department). Jerry McCreight presenting.			
<b>VII. Other Board Items for Discussion/Action</b>			
<b>A.</b> CONSIDER/ACT ON AUGUST, 2020 FINANCIAL REPORT	Vote	James Dworkin	
Discuss/Take Action to approve the August, 2020 International American Education Federation (d.b.a. International Leadership of Texas) Financial Report.			
<b>B.</b> CONSIDER/ACT TO ACCEPT AUDIT	Vote	James Dworkin	



## Cover Sheet

### APPROVE MINUTES OF AUGUST 19, 2020 REGULAR MEETING

**Section:** III. Approve Minutes of Prior Meetings  
**Item:** A. APPROVE MINUTES OF AUGUST 19, 2020 REGULAR MEETING  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for August 19, 2020 Regular Board Meeting on August 19, 2020

**DRAFT**

# International American Education Federation, Inc., d/b/a International Leadership of Texas

## Minutes

August 19, 2020 Regular Board Meeting

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### **Date and Time**

Wednesday August 19, 2020 at 6:15 PM

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### **Meeting Notice & Mission Statement**

In compliance with the Texas Open Meetings Act, the Texas Government Code, Chapter 551, timely public advance written notice (at least 72 hours before the scheduled time of the meeting) is given of the subjects to be considered by the Board of Directors of International Leadership of Texas (the "Board") and the Board will convene a Regular Open Meeting of the Board of Directors of International Leadership of Texas on the date and time set forth herein.

### **Special Notice: Public Meetings at Headquarters are Suspended Until Further Notice:**

International Leadership of Texas Board of Directors will be holding its regularly scheduled public board meeting on 8/19/2020 at 6:15 PM. Members of the public will be able to watch the meeting via the link <https://zoom.us/j/801651349> or by a link that will be posted on the ILTexas.org website (click the button "Board Meetings" to view any updates to this Notice).

If you would like to sign up to speak at the meeting, please send your name to [board@iltexas.org](mailto:board@iltexas.org), 24-Hours in advance so that we will be able to promote you to a panelist, which will allow you to speak with our board members.

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/s/ Finn Simmensen, For ILTexas' Board

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**Directors Present**

Chris Moreland (remote), Dr. Lynne Beach (remote), Major General James Williams (remote), PETER GUDMUNDSSON (remote), Soner Tarim (remote), Tracy Cox (remote)

**Directors Absent**

*None*

**Directors Arrived Late**

Soner Tarim

**Directors Left Early**

Soner Tarim

**Guests Present**

Aaron Thorson (remote), Caitlin Madison (remote), Charles Klein (remote), Don Harris (remote), Dr. Laura Carrasco (remote), Dr. Matilda Orozco (remote), Dr. Thomas Seaberry (remote), Eddie Conger (remote), Finn Simmensen (remote), James (Tim) Brightman, James Dworkin (remote), Jerry McCreight (remote), Joe Hoffer (remote), Lucy Mariappa (remote), Sherry Shinn (remote), Veronica Ibarra (remote), Victor Carrillo (remote)

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**I. Opening Items**

**A. Record Attendance and Guests**

**B. Call the Meeting to Order**

Major General James Williams called a meeting of the board of directors of International American Education Federation, Inc., d/b/a International Leadership of Texas to order on Wednesday Aug 19, 2020 @ 6:15 PM.

**II. Public Speakers**

**A. Guests who spoke, if any**

There were no guests who spoke.

**III. Approve Minutes of Prior Meetings**

**A. APPROVE MINUTES OF JULY 15, 2020 REGULAR MEETING**

Chris Moreland made a motion to approve the minutes from July 15, 2020 Regular Meeting on 07-15-20.

PETER GUDMUNDSSON seconded the motion.

The board **VOTED** unanimously to approve the motion.

**B. APPROVE MINUTES OF AUGUST 3, 2020 SPECIAL BOARD MEETING**

Chris Moreland made a motion to approve the minutes from August 3, 2020 Special Meeting on 08-03-20.

PETER GUDMUNDSSON seconded the motion.

The board **VOTED** unanimously to approve the motion.

**C. APPROVE MINUTES OF AUGUST 10, 2020 SPECIAL BOARD MEETING**

Chris Moreland made a motion to approve the minutes from August 10, 2020 Special Meeting on 08-10-20.

PETER GUDMUNDSSON seconded the motion.

The board **VOTED** unanimously to approve the motion.

Soner Tarim arrived late.

**IV. Executive Session**

**A. AUTHORIZATION**

**B. HEAR EMPLOYEE GRIEVANCE**

At 6:18 p.m., Board President James Williams asked the Grievant whether she preferred to be heard in Open, or Executive, Session. The Grievant elected to be heard in Executive Session. The Board entered Executive Session at 6:19 p.m. The board returned to Open Session at 7:33 p.m., having made no decisions in Executive Session.

**V. Act on Grievance in Open Session**

**A. CONSIDER/ACT ON EMPLOYEE GRIEVANCE**

Soner Tarim made a motion to uphold administration's decision.

Tracy Cox seconded the motion.

The board **VOTED** unanimously to approve the motion.

**VI. Superintendent-CEO Report and Information Items**

**A. SUPERINTENDENT-CEO REPORT**

Superintendent-CEO Eddie Conger reported to the Board.

- School is in session. There have been no COVID-19 cases reported.

**B. SCHOOL LEADERSHIP REPORT**

Dr. Thomas Seaberry reported to the Board.

- Campuses' performance in opening school and in COVID-19 preparedness has been remarkable.
- College Station operations commenced smoothly.
- Option-3 (on-campus Internet access) operations commenced smoothly with a small number of participating students.
- Virtual school operations throughout ILTexas are up and running.
- Meet-the-Teacher Night occurred.
- ILTexas were posted in Skyward for families to access. Zoom links and teacher information were posted to students via Seesaw. Single sign-on has been implemented partially and will be implemented comprehensively in the near future.

**C. CHIEF ACADEMIC OFFICER REPORT**

CAO Dr. Laura Carrasco reported to the Board.

- Scheduling this year is modified, taking into account last year's lessons.
- On Independent Study Day, activities are modified to reduce screen time.
- The Assessment Calendar is being updated as TEA directives are received.
- Goals and Objectives for improvement will be due in a few months.

#### **D. CHIEF ADMINISTRATIVE OFFICER REPORT**

Chief Administrative Officer Jerry McCreight reported to the Board.

- Vacancy Report.
- Policy for employee COVID-19 leave and how related to FMLA.
- Discussion ensued with reference to distinguishing COVID-19 from influenza and with reference to general responses, for example, when a family member of a student reports a positive test. Recently disseminated medical information indicates asymptomatic positive individuals are unlikely to transmit the virus.
- COVID-related resignations and vacancies are low to date.

#### **E. CHIEF OF STAFF REPORT**

Chief of Staff Aaron Thorson reported to the Board.

- With reference to incentives recently made available to ILTexas for teacher performance, Mr. Thorson noted that 90% of teacher incentive funds received by ILTexas will be paid to teachers.
- Superintendent-CEO Conger and several Board Members discussed statutory restriction of incentive funds to certified teachers, the time and expense of obtaining certification, and the relative strength or weakness of correlations between type of certification and student outcomes.

### **VII. Executive Session**

#### **A. CONSULT WITH ATTORNEY AS AUTHORIZED BY SECTION 551.071**

The Board again entered Executive Session at 8:26 p.m.

The board returned to Open Session at 9:22 p.m., having made no decisions while in Executive Session.

Soner Tarim left early.

### **VIII. Other Board Items for Discussion/Action**

#### **A. CONSIDER/ACT ON JULY, 2020 FINANCIAL REPORT**

Tracy Cox made a motion to approve the Report.

PETER GUDMUNDSSON seconded the motion.

CFO James Dworkin reported to the Board. The board **VOTED** unanimously to approve the motion.

#### **B. CONSIDER/ACT ON ADDITIONAL FOUR WEEKS FOR ONLINE TRANSITIONAL INSTRUCTION**

PETER GUDMUNDSSON made a motion to approve the additional four weeks for online transitional instruction.

Dr. Lynne Beach seconded the motion.

The board **VOTED** unanimously to approve the motion.

#### **C. CONSIDER/ACT ON TIER ONE HOLDINGS, LLC SECURITY SERVICES CONTRACT**

This item was held for future action. No vote was conducted.



**D. CONSIDER/ACT ON CHANGE ORDERS IN ATHLETIC FIELDS PROJECT AT ILTEXAS KELLER-SAGINAW HS.**

Chris Moreland made a motion to approve the change order.  
PETER GUDMUNDSSON seconded the motion.  
The board **VOTED** unanimously to approve the motion.

**E. CONSIDER/ACT ON CONTRACT FOR SCHOOL EXPANSION AT ILTEXAS KATY-WESTPARK HS.**

Dr. Lynne Beach made a motion to approve the contract.  
PETER GUDMUNDSSON seconded the motion.  
The board **VOTED** unanimously to approve the motion.

**F. CONSIDER/ACT ON TPCSA ADVOCACY GRANT**

PETER GUDMUNDSSON made a motion to approve administration going forward with acceptance of the grant.  
Tracy Cox seconded the motion.  
The board **VOTED** unanimously to approve the motion.

**IX. Closing Items**

**A. Adjourn Meeting**

Dr. Lynne Beach made a motion to adjourn.  
PETER GUDMUNDSSON seconded the motion.  
The board **VOTED** unanimously to approve the motion.  
There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 9:39 PM.

Respectfully Submitted,  
Finn Simmens

## Cover Sheet

### APPROVE MINUTES OF AUGUST 27, 2020 SPECIAL BOARD MEETING

**Section:** III. Approve Minutes of Prior Meetings  
**Item:** B. APPROVE MINUTES OF AUGUST 27, 2020 SPECIAL BOARD MEETING  
**Purpose:** Approve Minutes  
**Submitted by:**  
**Related Material:** Minutes for August 27, 2020 Special Board Meeting on August 27, 2020



# International American Education Federation, Inc., d/b/a International Leadership of Texas

## Minutes

August 27, 2020 Special Board Meeting

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### **Date and Time**

Thursday August 27, 2020 at 6:15 PM

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/s/ Finn Simmensen, For ILTexas' Board

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**Directors Present**

Chris Moreland (remote), Dr. Lynne Beach (remote), Major General James Williams (remote), PETER GUDMUNDSSON (remote), Soner Tarim (remote), Tracy Cox (remote)

**Directors Absent**

*None*

**Directors Arrived Late**

Soner Tarim

**Guests Present**

Aaron Thorson, Bryndan Wright, Charles Klein, Eddie Conger, Finn Simmensen, Frank Crabill, James (Tim) Brightman, James Dworkin, John Hough, Louis Felini, Tony Tinderholt

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**I. Opening Items**

**A. Record Attendance and Guests**

**B. Call the Meeting to Order**

Major General James Williams called a meeting of the board of directors of International American Education Federation, Inc., d/b/a International Leadership of Texas to order on Thursday Aug 27, 2020 @ 6:15 PM.

**II. Executive Session**

**A. AUTHORIZATION**

Soner Tarim arrived late.

**III. Board Items for Discussion/Action**

**A. CONSIDER/ACT ON TIER ONE SECURITY CONTRACT**

PETER GUDMUNDSSON made a motion to accept the five-year contract with Tier One Holdings, LLC.

Soner Tarim seconded the motion.

CLO Tim Brightman briefed the Board on the proposed contract with Tier One Holdings, LLC.

Tony Tinderholt, Senior Partner, Tier One Holdings, LLC made a presentation to the Board. The board **VOTED** unanimously to approve the motion.

**B. CONSIDER/ACT ON CONTRACT WITH KEY CONSTRUCTION FOR PORTABLES INSTALLATION AT ILTEXAS COLLEGE STATION K-8**

Tracy Cox made a motion to accept the contract with Key Construction for portables at ILTexas.

Chris Moreland seconded the motion.

Charles Klein briefed the Board on the contract with Key Construction for installation of portable buildings. The board **VOTED** unanimously to approve the motion.

#### **IV. Closing Items**

##### **A. Adjourn Meeting**

PETER GUDMUNDSSON made a motion to adjourn.

Chris Moreland seconded the motion.

The board **VOTED** unanimously to approve the motion.

There being no further business to be transacted, and upon motion duly made, seconded and approved, the meeting was adjourned at 6:51 PM.

Respectfully Submitted,  
Finn Simmensen

# Cover Sheet

## SUPERINTENDENT-CEO REPORT

**Section:** V. Superintendent-CEO Report and Information Items  
**Item:** A. SUPERINTENDENT-CEO REPORT  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** This Page is Blank.docx

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# Cover Sheet

## SCHOOL LEADERSHIP REPORT

**Section:** V. Superintendent-CEO Report and Information Items  
**Item:** B. SCHOOL LEADERSHIP REPORT  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** This Page is Blank.docx



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# Cover Sheet

## CHIEF ACADEMIC OFFICER REPORT

**Section:** V. Superintendent-CEO Report and Information Items  
**Item:** C. CHIEF ACADEMIC OFFICER REPORT  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** 2020 09 16 CAO Report Items combined.pdf

# **ILTexas Chief Academic Officer Board Report**

**[Week 6 of the First 6 Weeks Grading Period]**

September 16, 2020  
Presented by: Dr. Laura Carrasco





End of Cycle 1 → Preparing for Cycle 2

20-21 Vision: All students will make *at least* a full year's progress via Relationships,

Relevance, Rigor & Results

Time: 7:45 a.m. - 4:00 p.m.

Location: Your Home Campus

### Day's Goals:

- (1) Deliver Campus Priority PD/Work Sessions (AM)
- (2) Analyze Data & identify gaps in learning while also developing the reteach plan to close gaps,
- (3) Develop the instructional planning calendar (note- 2nd cycle has 20 days of First Instruction, A/B Days combined and 6 Independent Study Days) with high leverage TEKS that may need to be retaught reviewed based off of Cycle 1 ECAs. Please access the blank 2nd cycle instructional planning calendar [HERE](#) to guide you. You can copy and paste it onto your own document.

### AGENDA

**7:45-12pm** Principal's Agenda

**12-1pm** Lunch

**1pm-4:00pm** Data Analysis to Action

\*1pm breakout sessions for select groups listed below



# HB3: Reading Academies Year 1 of 3 Kick Off

HB3 Reading Academies require all Texas school districts to train all kindergarten - 3<sup>rd</sup> grade teachers, SPED teachers, principals, assistant principals over K-3 and instructional coaches in the Science of Reading.

This 56 hour course (scripted by TEA) educates our teachers an explicit and systematic way of teaching reading.

ILTexas has opted to be a local provider versus outsourcing this training, making it not only more cost effective but giving us more flexibility and local control. We have identified an internal candidate, Paige Benyacoub, GLA from Garland K-8, to be our Reading Academy Cohort Leader. This year we will train campus leaders, coaches and 100 teachers (volunteers-- early adopters). This first year 1 cohorts will begin on Sept. 14 and end on June 4.



# ILTexas Fine Arts Updates

Fine arts department is growing and now has 107 teachers supporting ILTexas students.

A new Fine Arts 2020 Year at a Glance Fine Arts and Vertical Alignments were created over the summer so now every fine art teacher has a detailed curriculum guide to follow. This will allow rigor to be increased in the fine arts classes and show student growth.

As of September 2 all ILTexas schools are enrolled and can participate in UIL Academics and Music activities and contests. Several ILTexas Band, Orchestra, and choir students are participating in All-Region and All-State Auditions via zoom.

Other Notables: Dance teacher Manny Silveyra at AGPHS shared with ILTexas how he taught dance class via zoom and between Facebook and Instagram there were 5700 views.

General Music teacher Kevin Haliburton at College Station KS created an online Talent Show and a full musical production via zoom with his students.



# *Instructional Coaching Playbook*

INTERNATIONAL LEADERSHIP OF TEXAS



# Table of Contents

Chapter 1 - Program Structure

Chapter 2 - Role & Responsibilities

Chapter 3 - Building a Collaborative Team

Chapter 4 - The Coaching Model & Process

Chapter 5 - Coaching Feedback

Chapter 6 - Coaching Program Evaluation



## Chapter One- District Coaching Program

### District Instructional Coaching Philosophy

Instructional Coaches support professional learning by providing assistance with various forms of Job-Embedded Professional Learning (JEPL), as well as working directly with teachers in their classrooms and during planning PLCs to assist with the application of new knowledge and skills necessary to improve the academic performance of all students (Killion & Harrison, 2006). Coaches work with team members to achieve individual, campus, and district goals by building capacity in team members through discussion, modeling, observation, reflection on fulfilling the promises of the ILTexas mission for our students. .

### Instructional Coaching Mission Statement

Instructional Coaches ensure that each teacher experiences personalized, job-embedded professional learning to promote student success through coaching focused on partnerships, teacher differentiation, reflection, and collaboration.

### The purpose of instructional coaching at ILTexas:

- a. to foster an environment that encourages professional growth among instructional staff members
- b. to identify, design, and facilitate activities that ensure personalized professional learning anchored around ILTexas curriculum, instruction, professional development, PLCs and program model
- c. to partner with administrators and teachers to support the strategic implementation of the ILTexas instructional program
- d. to facilitate teacher self-reflection of instructional practice designed to increase student learning
- e. to bridge communication between administrators and teachers that positively impacts expectations for teaching and learning
- f. to promote a safe culture that encourages continuous growth and learning by speaking honestly, through reflection and self-assessment and work around teacher observations and feedback

### Vision Statement

Instructional coaching at ILTexas will improve the instructional outcomes of students and educational attainment of teachers through teacher coaching and feedback and reflective practices anchored in the ILTexas mission.



### Instructional Coaching Capacity Building

Coaches understand and integrate district initiatives that support quality teaching and learning on their campuses. While all coaches are expected to have working knowledge in many areas, it is common that coaches also fall along a continuum of professional learning based on personal experience and emerging district and/or campus needs. All coaches will be provided continued opportunities to deepen their knowledge and proficiency in each of the following:

- Instructional Leadership – developing the ability to build relationships and collaborate with teachers and administrators and effectively implement a variety of coaching roles
- Content/Curriculum Knowledge – developing deep knowledge of subject-area content, state standards, and local curricular implementation of standards
- Instructional Strategies – developing an understanding of a wide range of instructional strategies to support teachers with initial instruction, intervention, and enrichment
- Coaching Tools – developing a toolbox of skills useful in accomplishing the work of coaching (i.e., tools for data analysis, classroom observation and feedback, collaborative planning, facilitation of groups, negotiating difficult professional conversations, etc.)

In addition to professional development, all coaches will have opportunities to network with other coaches within their ILTexas area and across the district through regularly scheduled IC Meetings. Lastly, a plethora of resources for professional development and networking are also available out-of-district. Coaches are encouraged to explore platforms such as blogs, social media groups, webinars, and coaching websites to enhance their professional practice.

# Chapter Two- Instructional Leadership Roles and Responsibilities

## Introduction

Defining specific roles and responsibilities for instructional leadership positions within a school provides structure and clear communication of expectations for campus leadership. This can also result in a collaborative team that operates strategically towards common goals, yet divides to conquer the tasks required to increase student achievement and accelerate teacher growth in instructional strategies.

## The Coaching Balance

In regards to the instructional coach position, it is important to maintain a coaching balance when considering the roles and responsibilities on the campus. The chart below gives a visual representation of the balance. If a coach is not in the classroom or given authority to provide coaching, the balance shifts to indifference for the position by staff. This can also occur if a coach is pulled for other duties that minimize the amount of time they can provide instructional support. On the other side of the scale is a coach who is operating as an administrator to teachers, giving directives and enforcing initiatives. The balance is the coach and teacher working together towards goals that are created in collaboration. The coach is to be a support tool and maintaining this positive and approachable partnership is vital to the success of an instructional coach.

**The Coaching Balance**

School's External Application of Power			Shared Balance of Power	Teacher's Self Protection of Power		
Evaluation	Supervision	Mentoring	Peer Coaching "The Ideal"	Consultation	Information Gathering	Indifference
This is solely the focus of administrators.  <b>Coaches should not work within this box.</b>	Coach focuses upon things such as curriculum implementation; school improvement; accountability procedures (i.e., ESSA compliance)  <b>Coach is in the classroom.</b>	Coach focuses on ensuring school-selected, research-based strategies are implemented; provides professional development; supports new teachers  <b>Coach is in the classroom.</b>	Teacher AND Coach mutually agree upon goals and collaboratively enact responses that follow Knight's Partnership Principles: Equality, Choice, Voice, Reflection, Dialogue, Praxis, Reciprocity  <b>Coach is in the classroom.</b>	Teacher discusses resources or ideas; is willing to discuss instruction but does <u>not</u> want coach in the classroom during instruction  <b>Coach is <u>not</u> in the classroom.</b>	Teacher asks for simple answers or information only; is <u>not</u> willing to discuss instruction and does <u>not</u> want coach in the classroom during instruction  <b>Coach is <u>not</u> in the classroom.</b>	Teacher avoids contact with the coach and fully disengages from the teacher leadership program.  <b>Teachers should not work within this box.</b>

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kevin.schlomer@gmail.com



**Foundational Components:**  
**Administrator Capacity - Coach Capacity - Teacher Collaboration - Program Vision & Infrastructure - School Culture**

Coach's Roles Based on: Barkley, S. G. (2010). *Quality teaching in a culture of coaching* (2nd ed.). Lanham, MD: Rowan & Littlefield. (p. 23)  
 Partnership Principles from: Knight, J. (2007). *Instructional coaching: A partnership approach to improving instruction*. Thousand Oaks, CA: Corwin. (pp. 40-52)

## Campus Guide and RACI Discussion Tool

The guide presented below is a supporting framework for instructional leadership positions such as area academic coordinator, content area coaches, principal, assistant principal, instructional coach, grade level administrator, and teacher. These roles and responsibilities are broken down into the categories: lesson plans, assessments and data analysis, professional learning communities, professional development, observations, content resources, and strategic planning. The ILTexas Instructional Leadership Roles and Responsibilities document is for campus administrators to use as a guide. There is also a tab within the document providing a customizable discussion tool that a campus can use to brainstorm how the principal, assistant principals, instructional coaches, and grade level administrators can work collaboratively towards campus improvement efforts. This tool is centered around the RACI model as the basis for guiding the discussion.

### RACI Model

The RACI model is a straightforward way to identify roles and responsibilities. The acronym stands for:

- R- Responsible
- A- Accountable
- C- Consulted
- I- Informed

Using the RACI model to guide discussions is easy. You look at a task that needs to be accomplished and discuss who is responsible for completing the task, accountable to the implementation and outcome, consulted regarding the task, or informed of the task at some point in the process. For example: If the principal, assistant principals, instructional coaches, and GLAs are discussing lesson plan checks and follow up, the results may look something like what is in the RACI Example table below. Simple letters can be put in the empty discussion tool boxes, or more details can be written to provide further clarification.

### RACI Example

	Principal	Assistant Principals	Instructional Coaches	GLAs
Lesson Plan Check	A,I	I	R	I
Lesson Plan Follow Up	A,I	R,A	C,I	R,A

To make a copy of the entire document to use for your campus, use this link:

[ILTexas Instructional Leadership Roles and Responsibilities](#)

## Snapshot Section of the ILTexas Instructional Leadership Roles and Responsibilities

ILTexas Instructional Leadership Roles and Responsibilities							
	Area Academic Coordinator	Content Area Coaches	Principal	Assistant Principal	Instructional Coach	GLA	Teacher
<b>Lesson Plans</b>							
<p>Areas addressed in this section include:</p> <p>weekly lesson plan checks, follow up and accountability, and lesson plan quality and expectations</p>	<p>Will check lesson plan quality for teachers observed during campus visits and provide constructive feedback to teachers, as needed. Communicate with admin team and IC regarding lesson plan concerns that may need to be addressed or follow up in needed.</p>	<p>Informed of weekly lesson plan checks by the IC.</p>	<p>Informed of weekly lesson plan checks by the IC. Follow up on missing plans if needed. APs will contact GLA first to follow up on missing plans. If numerous weeks in a row are missing, AP may follow up directly with teachers.</p>	<p>Check lesson plan submissions every Monday and send a report of whose is missing to Principal and APs. Will check quality of lesson plans as directed by principal. Consider doing a grade level a week as a focus.</p>	<p>Submit weekly lesson plans. Can be utilized as a point of contact by the AP to follow up with a grade level teacher in regards to missing or incomplete plans.</p>		<p>Submit weekly lesson plans.</p>
	<p>Provide content area resource and training teachers will need to lesson plan effectively and according to district guidelines.</p>	<p>Provide resources and trainings teachers will need to lesson plan effectively and according to district guidelines.</p>	<p>Assist principal with resources and trainings, as directed, for teachers to effectively lesson plan</p>	<p>Assist principal with resources and trainings, as directed, for teachers to effectively lesson plan</p>	<p>Provide assistance to grade level team with resources and seeking out possible trainings that would benefit their team in effective lesson planning.</p>	<p>Learn and use instructional resources and communicate with GLA if additional resources are needed or desired.</p>	
	<p>Support the district curriculum and instruction expectations for lesson planning in trainings and resource materials provided.</p>	<p>Communicate the lesson plan quality expectations to staff</p>	<p>Support the implementation of lesson plan expectations of staff that is communicated by the principal</p>	<p>Support the implementation of lesson plan expectations of staff that is communicated by the principal. Provide coaching to teachers needing improvement.</p>	<p>Support the implementation of lesson plan expectations of staff that is communicated by the principal. Provide coaching to teachers needing improvement.</p>	<p>Meet lesson plan expectations communicated by the principal.</p>	
<b>Assessments &amp; Data Analysis</b>							
<p>Areas addressed in this section include:</p> <p>data reports each cycle, analyzing data reports to identify areas of improvement, campus improvement plan, weekly check points, data driven instructional strategies and implementation, STAAR prep plan, monitoring school data for trends</p>	<p>Support and encourage implementation of district initiatives, as well as campus based needs communicated by the admin team.</p>	<p>Establish campus performance objectives using data in collaboration with a campus improvement committee.</p>	<p>Assist the principal in establishing campus performance objectives using data in collaboration with a campus improvement committee.</p>	<p>May be asked to assist the principal in establishing campus performance objectives using data in collaboration with a campus improvement committee.</p>	<p>May be asked to assist the principal in establishing campus performance objectives using data in collaboration with a campus improvement committee.</p>	<p>May be asked to assist the principal in establishing campus performance objectives using data in collaboration with a campus improvement committee.</p>	
	<p>Analyze assessment and observation data during campus visits to identify areas for possible improvement. Communicate findings with the admin team and IC.</p>	<p>Analyze assessment and observation data to identify areas for improvement</p>	<p>Collaborate with principal in analyzing observation data to identify areas for improvement.</p>	<p>Collaborate with principal in analyzing observation data to identify areas for improvement.</p>	<p>May conduct classroom observations of their grade level teachers to provide support and identify areas of improvement.</p>	<p>Analyze student assessment data on classroom and district assessments to drive instruction and planning.</p>	
	<p>Provide assistance and feedback based on campus site visits and data analysis, regarding the monitoring of student progress by teachers through formative/summative assessment data and data-driven instruction.</p>	<p>Maintain frequent communication with APs and ICs to ensure teachers are conducting weekly checkpoints, teacher monitoring of student progress, and triage meetings are runnings smoothly.</p>	<p>Maintain frequent communication with Principal regarding submission of weekly checkpoints, teacher monitoring of student progress, and triage meetings. Ensure weekly checkpoints are being submitted, if duty is assigned by campus principal.</p>	<p>Maintain frequent communication the principal and APs regarding teachers monitoring of student progress based upon classroom observations and PLCs. Provide coaching to teachers and teams who may need additional strategies or coaching on formative assessments, data tracking, and using the data to drive instruction.</p>	<p>Maintain frequent communication the principal, APs, and ICs regarding their grade level monitoring of student progress based upon formative and summative assessments and PLC planning. Provide support to grade level team and bring in the IC to assist as needed.</p>	<p>Monitor student progress through formative and summative assessments. Stay in communication with grade level team regarding students progress.</p>	

## Snapshot of the Customizable Discussion Tool

Customizable Discussion Tool for Instructional Leadership Roles & Responsibilities					
	Discussion Topic	Principal	Assistant Principal	Instructional Coach	GLA
<b>Lesson Plans</b>					
	Weekly lesson plan check and follow up				
	Lesson planning resources and training				
	Lesson plan expectations				
<b>Assessments &amp; Data Analysis</b>					
	Campus performance objectives				
	Identifying areas for improvement				
	Weekly checkpoints, monitoring of student progress, and triage.				
	Data PD day expectations, scheduling, and tools needed				

# Chapter Three- Building A Collaborative Team

## Introduction

An essential piece to school improvement and developing a positive and flourishing coaching environment on a campus is building a solid collaborative team with unified goals and communication. Schools that have made drastic campus improvements in school achievement share commonality in having a strong principal who takes the role of instructional leader and works collaboratively with other instructional leadership roles on the campus to drive change. Clear expectations and communication between these stakeholders increases the effectiveness of campus improvement plan implementation and growth.

## Principal/Coach Partnership Agreement

One key area that is impactful is when the principal and instructional coach communicate expectations and goals at the beginning of the year and develop a principal/coach partnership agreement. Keeping consistent communication throughout the year aids in course corrections and consistent communication to campus staff. Learning Forward offers a principal and coach agreement talking guide that navigates several areas of school improvement and coaching needs on a campus. The conversation is two-way and allows the principal and coach to develop clear expectations and communication to effectively implement coaching on campus. There is also a link to a note-taking tool that the principal and coach can use to document answers and sign as an agreement. Snapshots and links to both are provided below. The purpose behind a principal and coach partnership agreement is to be proactive in driving school improvement change aligned to the campus improvement plan and establish unified collaboration and communication from the instructional leadership team. Including assistant principals in this conversation and agreement is also a way to increase collaboration amongst the leadership team.

Questions and Talking Guideline :

<https://learningforward.org/wp-content/uploads/2006/12/nsdc-tool.pdf>



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### Developing a partnership agreement between a coach and a principal

#### ROLES, RESPONSIBILITIES, AND BOUNDARIES

*Agree on the roles coaches will fill within the school, other responsibilities the coach will have, such as teacher duties, etc., and what coaches will not do.*

#### Coach

- What expectations do you have of me and the work I do?
- What responsibilities will I have as a member of this staff?
- What are the boundaries of my work?
- What is outside the boundaries of my work?
- How do you feel about me ... serving on a district committee, facilitating a school committee, etc.

#### Principal

- What do you expect of me?
- What do we think teachers expect of you?
- What does the district expect of you?
- What are the defined responsibilities of your role as a coach?
- How much flexibility do we have to adjust your work to meet the needs of our students and staff?

**By answering these questions, a principal and a school-based coach can develop a set of agreements that can guide their work in a school**

Note-taking Tool and Partnership Agreement:

<https://docs.google.com/document/d/1FivvqL06uTb2R7GkusmDNZNHBvkCIkRBUXoYsU4o0-s/edit>



**Partnership Agreement Between Instructional Coach and Principal**

Instructional Coach: \_\_\_\_\_

Principal: \_\_\_\_\_

ROLES, RESPONSIBILITIES, AND BOUNDARIES	
Coach	Principal
What expectations do you have of me and the work I do?	What do you expect of me?
What responsibilities will I have as a member of this staff?	What do we think teachers expect of you?
What are the boundaries of my work?	What does the district expect of you?

## Chapter Four- The Coaching Model & Process

### Introduction

There are various types of coaching models and methods that are research based. The important thing to remember is that coaching does not have a “one size fits all” solution that will work for every teacher. Each situation and person is unique and various methods may need to be explored to find one that fits. However, there are some basic best practices that are vital and essential to instructional coaching success. This chapter addresses these overall best practices such as building relationships, basic roles of an instructional coach, the heart of coaching, coaching focus, and the coaching cycle.

### The Heart of Coaching

Positive relationships are at the core of effective coaching. Protecting the coaching relationship with teachers is important in each of the ten roles listed in the graphic. Coaching is seeing potential for growth in each teacher and helping them maximize their potential. It is working alongside, and in collaboration with, a teacher in which both coach and teacher are setting goals and learning alongside each other.

The best coaches have the ability to ask questions and guide a teacher towards areas of growth, with the teacher thinking it was their idea all along. There is ownership in the learning process when goals and areas of focus are created by the learner instead of given by the coach.

### Building Relationships

The foundation for successful coaching is relationship building with teachers. Teachers must see the coach as a support system who is approachable and trustworthy. For the first few weeks of school, classroom walkthroughs should include notes of encouragement and positive reinforcement. This builds a culture of trust in the relationship. Teaching is very personal and not everyone is responsive to feedback. Spending time building the relationships with teachers will increase the likelihood that feedback is received well. Here are some great ideas and tips for building relationships with teachers throughout the year:

1. Learn their name in the first few weeks of school and call them by name often.
2. Be intentional to ask about their personal lives, families, hobbies, and passions. Follow up on these discussions.
3. Be vulnerable and transparent. When we model this, others will be more likely to open up as well. We want teachers to feel comfortable coming to a coach to share a struggle and ask for help.
4. Leave notes of encouragement via sticky notes or emails.
5. Schedule time in your day to have lunch with teachers. Avoid talking about school, but instead engage in conversations about life! Remember this is their “break” from work and you don’t want to bring work conversations into their lunch time.
6. Take something off their plate by practicing servant leadership. (Research a resource they are interested in and send them information, pull a data report they need, grab them some coffee from the teacher’s lounge, help them hang something on their wall or in the hallway during their off period). All of these create opportunities to strengthen the relationship and let them know that you care about them as a person.
7. Stop by every once in a while to just check in and see how their day is going. This little action can go a long way for some teachers who just want to know that we see them and they feel *heard*.

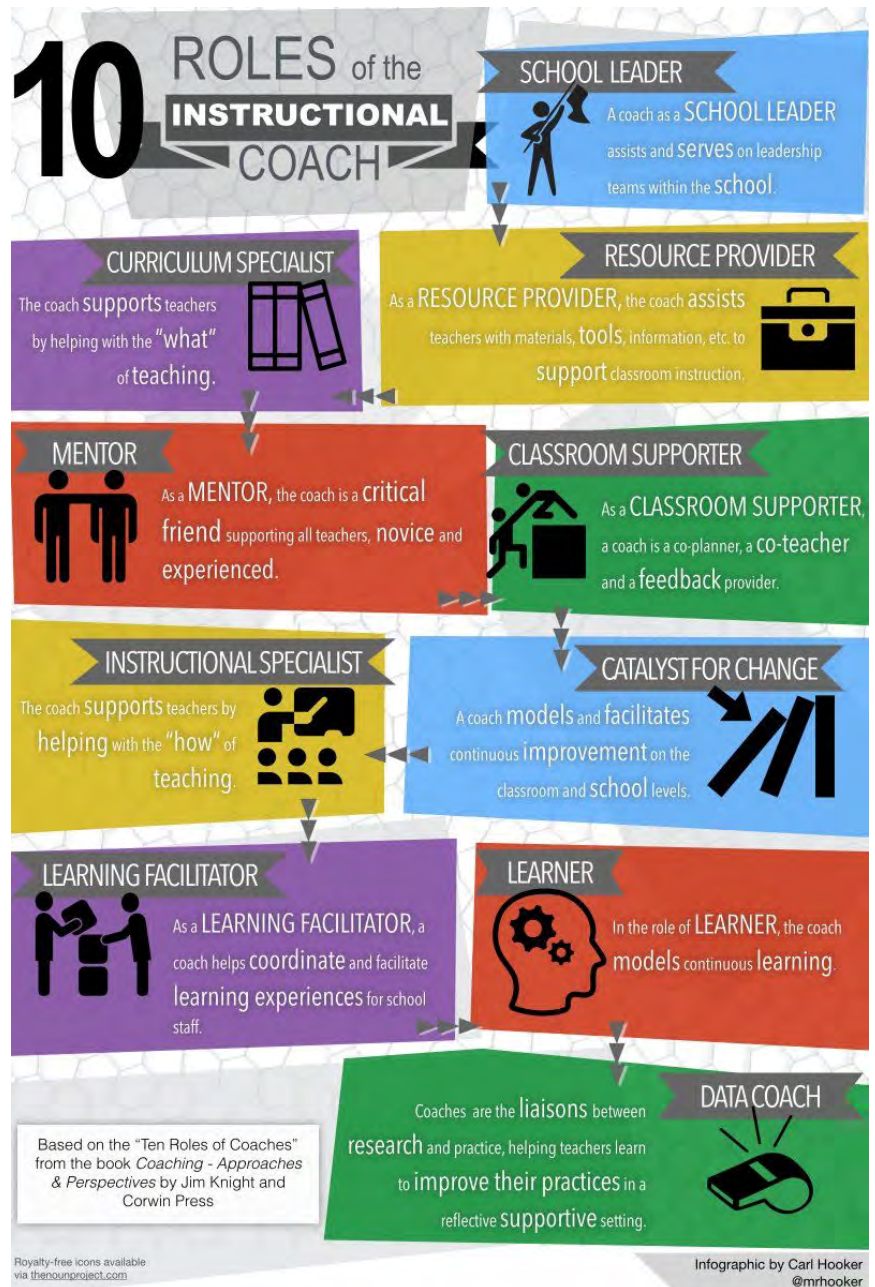


- Shout out their great work and accomplishments. (I have seen this done in weekly IC newsletters, campus Group Me, or through an email. Teachers work so hard and it feels good to be recognized.

### Basic Roles of an Instructional Coach

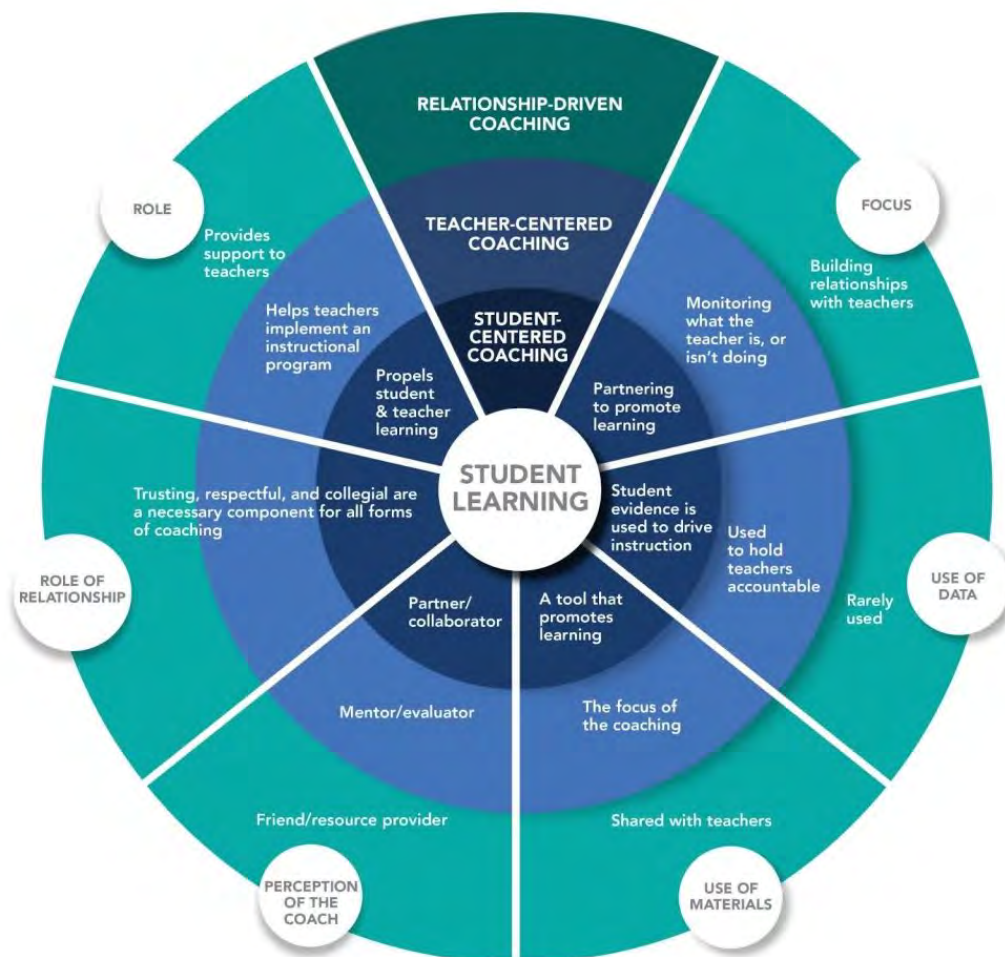
Instructional coaches wear many hats on a campus and sometimes you are wearing several hats at once. Chapter two outlined an instructional coach's role in relation to various topics and what they look like working in collaboration with other administrative roles. The "10 Roles of the Instructional Coach" is a good summary of the various roles that an instructional coach serves in for their campus. An instructional coach should exemplify these roles with a positive and solutions-oriented growth mindset.

**INSTRUCTIONAL COACH BECAUSE MULTI-TASKING NINJA ISN'T AN OFFICIAL JOB TITLE**



## Coaching Focus

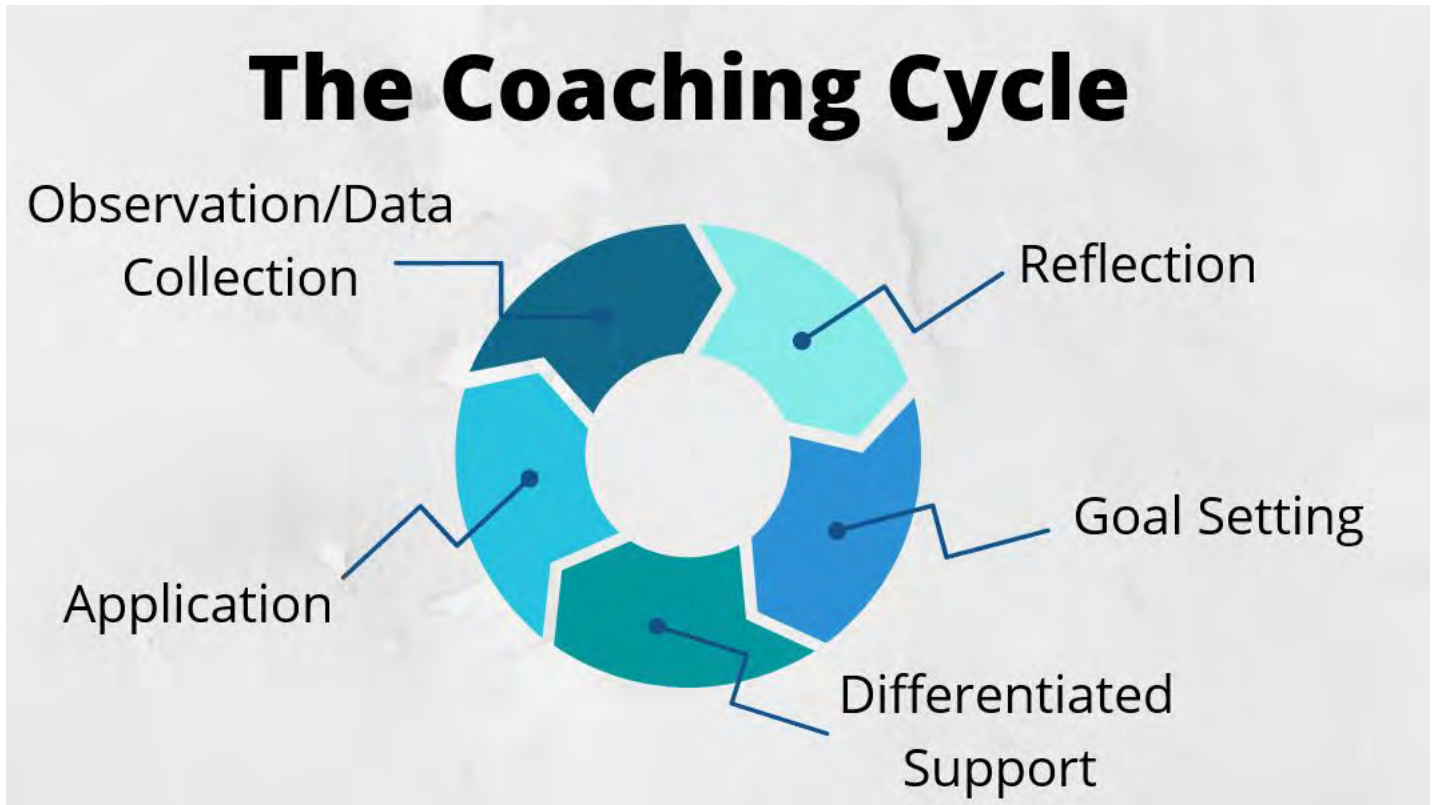
There are various types of research based coaching models such as relationship-driven, teacher-centered, and student-centered displayed in the graphic below by Diane Sweeney. All three are not mutually exclusive and should all be considered during the coaching process. Coaching using one method in isolation prevents differentiation. It is best practice to ask teachers to differentiate for their various students in the classroom. Coaches should model this in the way they provide teacher support as well. When it comes to instructional coaching, the best coaching model is one that is relationship driven that provides teachers coaching support in a way that addresses student-centered learning. The goal of growing teachers in instructional practices is to ultimately impact student achievement. Although relationships are the foundation to productive coaching, in and of itself, it is not enough to grow teachers. Once the relationship foundation is built, the coach can tailor support for teachers to grow and develop instructional strategies based on student data and classroom observations. The diagram below illustrates how all three of these components can work together to impact student learning.



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## The Coaching Cycle

If you research coaching cycles, you will see a wide variety of methodologies and models. The coaching cycle presented here includes the core threads that are best practices and provide flexibility and differentiation for the coach. Every coaching situation and teacher is unique and may require starting at different locations in the coaching cycle, as well as changing the order of events in the coaching cycle. Each component of the cycle is broken down into further detailed descriptions in this chapter.



### Observation/Data Collection

Classroom observations are critical for a coach to gather valuable data of teacher tasks and student tasks in order to identify areas of improvement to increase student academic achievement. These observations can be short or a longer period of time and should be recorded in the Whetstone tool to track data and increase coaching effectiveness. Combining classroom observation data with campus assessment data will allow a coach and the administrative team to identify trends and find areas that need coaching support and intervention.



**RELATIONSHIP BUILDING**

1. Develop trust with positive feedback for initial observations.
2. Highlight strengths.



**RECORDING OBSERVATIONS**

1. Utilize the Whetstone observation tool
2. Take notes on key "look for" areas found in Whetstone



**OBSERVATION DATA**

1. IC walkthroughs
2. Administrator and district coach observation data



**STUDENT DATA**

1. Formative & Summative Assessments
2. Student tasks & engagement data from classroom observations



**CAMPUS TRENDS**

1. Schoolwide trends and areas of needed support
2. Grade level and teacher specific trends

# OBSERVATION DATA COLLECTION

**Key Things to Look For**

- Positive and safe classroom learning environment
- Routines and procedures for classroom management
- Student engagement
- Alignment of lesson and student tasks to the TEKS and pacing guide
- Content and language objectives
- DLI language supports for K-5 and LOTE classrooms
- Rigor of the lesson and student activities

**Reflection**

Promoting self-reflection and empowering teachers to make autonomous decisions about their practice is at the heart of building a coaching partnership. Using such practices can put teachers at ease and diminish the tendency to operate using defense mechanisms. Both novice and highly experienced teachers (as well as those in between) can benefit from building a partnership with instructional leaders, but building this partnership requires administrators and coaches to become highly skilled at asking thought-provoking questions that, ultimately, prompt teachers to think deeply about the instructional decisions they make and the outcomes produced as a result of those decisions. There must also be a concerted effort to build a campus culture that embraces change as part of the overall improvement process.

**Reflective Coaching**



Through the use of Reflective Coaching, which aligns and works well with the coaching cycle, the instructional coach is there to support, empower, listen, and provide accountability. The focus of this instructional coaching model is to provide a time and space for healthy, respectful conversations in which both the coach and teacher leave feeling more able and committed to making a positive difference in children's lives. While facilitating dialogue and leading with guiding questions, it is imperative that the instructional coach consider the experience level of the teacher and his/her pedagogical foundation as a basis for adjusting questions accordingly.

After classroom observations and data analysis, coaches should reflect on the data and work with the admin team to identify areas to address through the coaching process. Part of the coaching reflective process is preparing what you are going to say during a debrief coaching session with a teacher following a classroom observation. Questions should be meaningful, targeted, and adapted to the teacher’s learning style and depth of instructional practices. A good reflective tool to use is the “See it. Name it. Do it” method by Bambrick in *Get Better Faster*.

### Goal Setting

After the reflection phase is the goal setting phase where the teacher and the coach choose a next action step that is bite size and will directly impact the learning environment and student achievement. The coach and teacher work together in this phase to set the goal and choose a timeline to plan and implement the next step.



Paul Bamrick states in his book, *Get Better Faster*, that helping teachers work on new instructional practices in bite-size chunks will increase the effectiveness of implementation and yield better results.

## Differentiated Support

Differentiating coaching support is best practice, but what does that look like? Jane Kise in her book *Differentiated Coaching* provides some practical examples of application. There is also a blog by Ryan Drago in which he speaks about this topic. Here is a sketch from one of his postings.



The concept behind differentiated coaching is to apply the same best teaching practice of tailoring instruction and support to the specific needs of the students. Teachers have various personality types, learning styles, and ways that they will receive coaching more effectively. The goal for a coach is to not try to fit every teaching into your personal coaching style, but to adapt your coaching style to the needs of the teacher. The more experience a coach develops in tailoring coaching styles to the wide range of teacher needs, the quicker they become at finding the right coaching method. Some teachers with little experience or depth of knowledge in instructional strategies and pedagogy may need more targeted advice and support, while still collaborating with them in the reflective and goal setting process. A veteran teacher with strong pedagogy and instructional tools may need less targeted advice, but need more of a reflective coach who is just facilitating the process through questions and letting the teacher lead more of the conversation.

There are also different types of ways that a coach can provide support after the goal setting phase and before implementation of the action step. The best way to determine what a teacher may need is to ask them what kind of coaching they think would be most helpful to them. Give them an array of options listed below and let them pick one or all of them. It is still okay, however, to suggest options to a teacher that you think may be helpful. There is power in choice for a teacher in this part of the process.

- Planning support- examples of this type of support include sitting down with a teacher to pace out a lesson, practice writing accurate content and language objectives, dissecting the learning standards and aligning the lessons to learning outcomes, planning a well rounded lesson cycle to include key components, increasing engagement, focusing in a specific goal such as increasing dual language strategies or including more student centered activities and writing opportunities.
- Modeling- this can be personal for a teacher to hand over their classroom to a coach to teach part of a lesson that demonstrates the strategy. It is also an incredibly powerful tool if the teacher is open to this type of coaching.

Modeling can be used as part of a coaching gradual release method where the coach models the strategy in part of a lesson. Then the teacher and coach co-teach a lesson together using the strategy. After, the teacher can practice the strategy on their own while the coach just observes. Modeling can happen in various forms including in a classroom of students, in a planning period with a group of teachers, and peer to peer modeling when another teacher models a lesson to their peers. Peer to peer modeling is a great way for a coach to work alongside teachers in a collaborative environment where the coach and teachers get to model best practices with each other.

### TIPS FROM THE FIELD

- Great for a teacher learning a new strategy, a resource, specific content, a new routine, tiered questioning, increased rigor, etc...
- Determine with the teacher the time and lesson you will model. Incorporate it into their lesson so you do not get them behind on pacing.
- Modeling in a small group is great, especially for first year teachers who can learn from the coach and veteran teachers.
- After modeling, take time to reflect and discuss with the teacher how it went. It is great to provide the teacher an observation sheet to fill out while they are observing the model lesson.
- Allow the teacher to determine whether they would like to co-teach the strategy, or the teacher may feel ready to practice the strategy on their own.

## MODELING

### TYPES OF MODELING

- SMALL GROUP
- COACH TO TEACHER
- COACH TO CLASS
- PEER TO PEER

- Co-teaching- this can be a powerful coaching support tool if a teacher is comfortable with you teaching the class alongside them as they implement the new strategy.

• **Reasons for co-teaching with a teacher are to provide support for implementation of a new strategy, a resource, specific content, a new routine, tiered questioning, increased rigor, etc...**

• **When co-teaching, allow the teacher to take the lead in the lesson.**

• **Provide support for the teacher only when crucial components of the strategy are overlooked.**

## CO-TEACHING

• **Afterward, discuss what worked and what needs more practice.**

• **By the end of the day, or the following morning, revisit the teacher and discuss any changes they may have implemented, and how you can support them**

- Data Analysis: some teachers may need support in looking at student data and analyzing it with the coach to find trends and learn how to provide differentiation support and interventions for students. This can also be included in

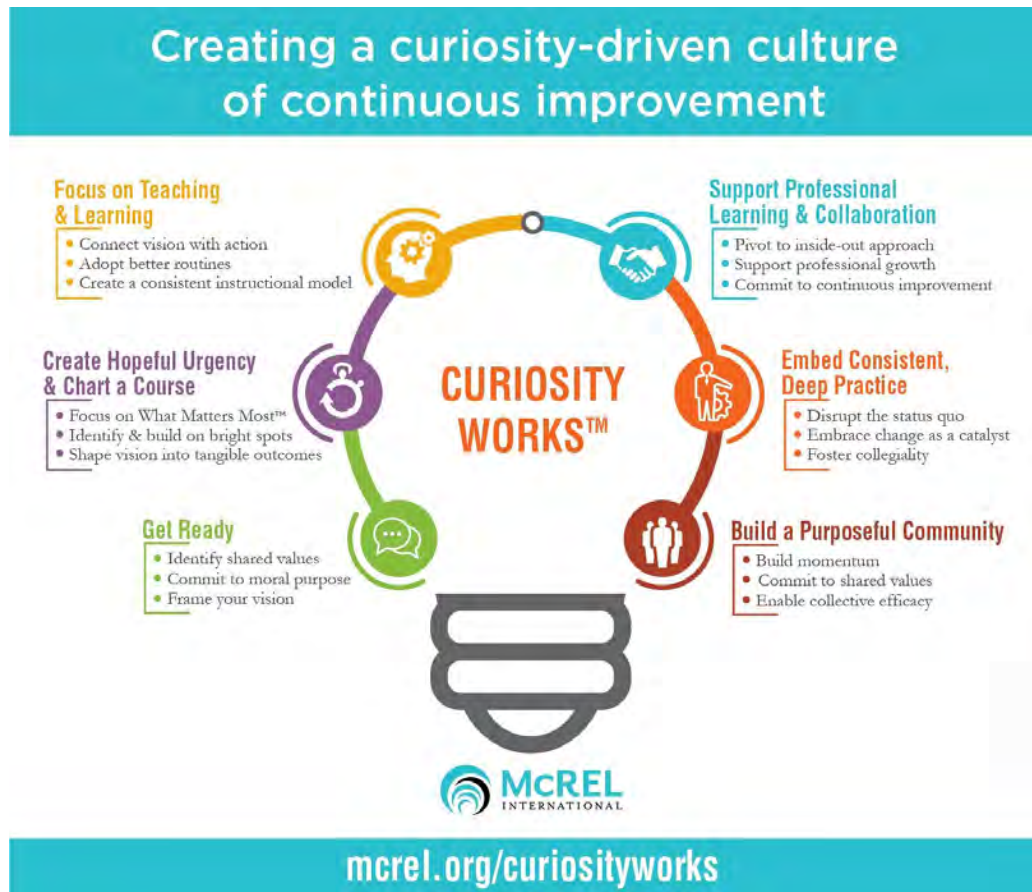
lesson planning support to demonstrate how data can drive instructional planning as formative assessments are created and implemented throughout the lesson cycle.

### Application

The implementation phase of the coaching cycle is when the teacher begins to implement the instructional strategy in the classroom. During the goal setting phase, the coach and teacher establish the frequency and timeline of implementation. Some strategies, such as classroom management strategies may need to be implemented on a daily basis. Other strategies, such as aggressive monitoring or an engagement strategy, may be planned and implemented once or twice a week to start. Coach follow up during this phase is important, but it is also important to give the teacher time to try the new strategy on their own. Again, every teacher is different and the type of coaching follow up support may vary based on their preference. Some teachers may want the coach there the first time they try it to get immediate feedback. Others may want to try it for a few days to refine the strategy and have the coach follow up several days later to provide feedback. There are also times that the coach may suggest being a part of the application phase, especially if a teacher is struggling with classroom management and needs intense support to transform their classroom into a positive learning environment.

### Does The Coaching Cycle Have An End?

The simple answer is no. The goal of a coach should be focused on continuous improvement and supporting a culture of continuous improvement in teachers and the campus as a whole. There are times that some teachers may not receive as much support as others for a season because, if we are being realistic, a coach has to prioritize their time and efforts based on the needs of the campus and the teachers. McREL International has a great summary of continuous improvement efforts and the key components that build this type of culture.





# Chapter 5- Coaching Feedback & Tiering

## Introduction

One way teachers are able to improve instructional practices is through receiving feedback. Much like there is value in students receiving targeted feedback from their teachers, instructional coaches and administrators can help teachers hone in on specific areas of growth by sharing feedback.

Instructional coaches should consider the following when providing feedback:

- Feedback can be shared in a variety of ways (formal/documented, informal conversations, short notes, etc.).
- Feedback should be based on non-evaluative observations.
- Developing common standards, common language and shared definitions for commonly used terms across the campus can strengthen the impact of feedback.
- Sharing objective feedback that is based on evidence can reduce potential misunderstandings based on opinion.
- Engaging teachers in two-way conversations and [asking guiding questions](#) can empower teachers to become more involved in improving their own practices. *(note: although T-TESS is an evaluative tool, some of the sample conference questions may be helpful in planning feedback conferences)*
- Recording lessons (with the teacher’s consent) can allow the teachers to reflect on their own practices.
- Scripting feedback using Paul Bambrick-Santoyo’s [Six Steps for Effective Feedback](#) can support coaches with planning feedback conversations.

## Four Types of Feedback

Considering what takes place during an observation, the purpose of the feedback, and the teacher’s level of need can help coaches to determine what type of feedback to provide following an interaction with a teacher. It is vitally important to remember coaching usually does not achieve optimal results if a one-size-fits-all approach is implemented for all teachers. Just as instruction must be differentiated to meet the needs of diverse learners, coaching and feedback should be differentiated based on teachers’ individual needs. Below, four types of feedback are outlined.

Four Types of Feedback			
FEEDBACK TYPE	WHAT <small>What is the purpose?</small>	WHO <small>Who would be an ideal candidate?</small>	WHY <small>Why is it beneficial?</small>
<b>Diagnostic</b>	describe why a lesson has not succeeded  clarifies the teaching principles that will support improvement	novice teachers or teachers with limited pedagogical knowledge	helps teachers understand why a lesson was not effective
<b>Descriptive</b>	Provide specific directions about what to do differently	teachers who are struggling with a specific part of the lesson	assists teachers with exploring potential course corrections
<b>Prescriptive</b>	Summarize teaching performance	reflective teachers with a fundamental grasp of pedagogy	supports teachers with identifying what was or was not effective during a lesson
<b>Micro</b>	Share minor adjustments	Effective teachers with strong pedagogical practices	identifies minor improvements that can be made to make instruction even more effective

## Feedback Tools

ILTexas uses a variety of tools to assist with providing teachers with feedback in a number of areas. The primary tools are listed below.

<b>Observation &amp; Feedback Tools</b>			
<b>OBSERVATION/ FEEDBACK TOOL</b>	<b>WHAT</b> <small>What is the focus?</small>	<b>WHO</b> <small>Who uses the tool?</small>	<b>HOW</b> <small>How do teachers receive feedback?</small>
<b>Whetstone</b>	general practices related to classroom management, instruction and ILTexas initiatives	campus coaches area content coaches	post-conferences with campus coach or area coach
<b>Modified T-TESS</b>	general practices related to classroom management, instruction and ILTexas initiatives	administrators	post-conferences with campus administrator
<b>TIPS</b>	dual language strategies and requirements	DLI coaches and administrators	post-conferences with DLI coach
<b>BRES Engagement</b>	classroom management strategies to support student engagement	campus coaches	post-conferences with campus coach
<b>Informal</b>	anything observed during observation, planning or review/development of instructional materials	all of the above	sticky note or brief conversation

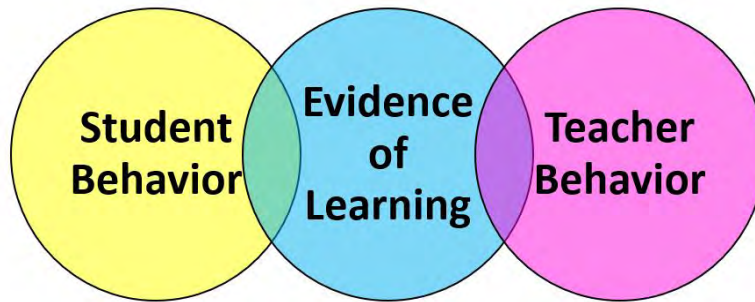
(Click [here](#) to access live document with links to each tool)

## Collaborating and Calibrating with Other Observers

It is likely that teachers will be observed by administrators, campus coaches, area content coaches and other individuals at different times. Following their visits, each observer will likely provide feedback based on two things: what was observed during that particular visit and the areas of focus included on the observation tool used during the observation. As a result, each person may provide the teacher with feedback that prompts them to focus on a particular area of growth. In such cases, teachers may begin to feel overwhelmed by trying to attempt to focus on improvement in multiple areas simultaneously.

Collaborating with administrators, area coaches and other teacher leaders can help to identify and streamline the major areas of focus that campus leaders strive to develop across the campus by building capacity in all teachers. Additionally, collaborating with others, leadership teams also have an opportunity to share objective information that helps everyone on the team to better understand the strengths and challenges of each individual teacher, grade level team, content team, and campus as a whole. When all team members develop a shared understanding of these factors, it becomes easier to identify campus needs and ways to address them effectively. With the support of the leadership team, the coach is also able to delineate a clear path for teacher development by providing targeted feedback achieved through consensus,

At the campus level, *calibration*, establishing consistency among observers and establishing trust in the process, is another way to strengthen the instructional leadership team’s ability to support teachers in the growth process. Coaches can enlist support from other instructional leaders by inviting them to accompany them during observations. Prior to beginning calibration walks, as a team, deciding upon the areas of focus and what the common expectation is for each of those areas is critical. After determining the basic elements of the calibration walk, the calibration team may want to develop a common set of questions that focus on the following areas:



### Teacher Tiering

Determining how much support teachers receive and who will be primarily responsible for providing that support should also be agreed upon between administrators and instructional coaches. While some teachers will need extensive support (Tier 3), others may only need minimal support (Tier 1). One way that administrators and instructional coaches can collaborate to determine the level of support each teacher needs and develop a rationale for the need is through the use of a Teacher Skill/Will Matrix. In addition to using a Skill/Will Matrix, tiering conversations are connected to *how* teachers are assigned to an instructional coach’s caseload.

**Skill/Will Matrix** - The Skill/Will Matrix suggests that teachers can be characterized in broad terms based on the intersection of their level of pedagogical knowledge and application, which is referred to as *skill*, and their level of motivation to succeed, which is referred to as *will*. Depending on whether a teacher is deemed to be “coachable” helps with determining how much time and effort can impact his/her overall performance. Each category can be defined using the categories below or a campus-created variant.

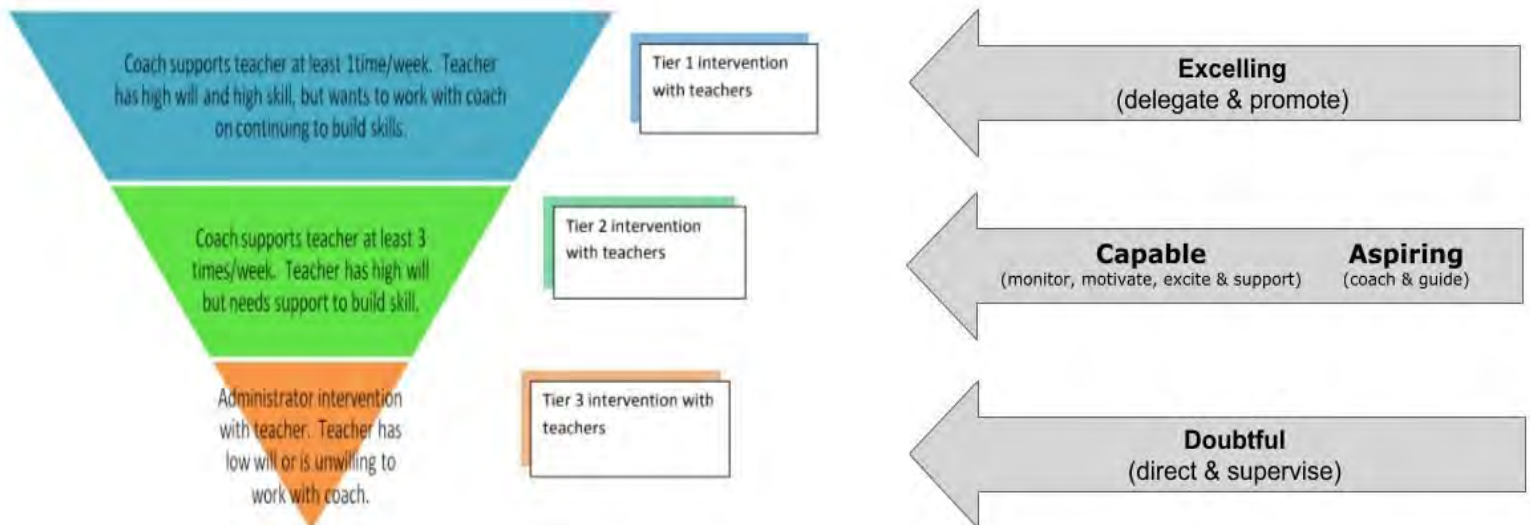
### Matrix Category Descriptions

- **Excelling:** expert teachers or teachers who are close; if they are not supported properly, they may end up Low Will-High Skill
- **Capable:** teachers who have the ability to excel, but are unmotivated; they often resist new initiatives, but when motivated, these teachers can quickly become High Will-High Skill
- **Aspiring:** novice or struggling teachers who have the desire to improve, but need to build their skills; the danger with this group is that they will become Low Will-Low Skill if their needs are not recognized and supported
- **Doubtful:** teachers who display little motivation and perform poorly; typically, they may be unwilling and/or unable to be effective in their current role; consider a root cause analysis to determine if performance is related to motivation, suitability, or ability.

### Skill/Will Matrix



**Coaching Caseload-** Another factor to consider is how teachers become part of a coach’s caseload for coaching and feedback. This process can become simpler based on the tiering system. As outlined below, there are a number of ways that teachers are “enrolled” for coaching support. How the support process is initiated can sometimes directly impact the teacher’s receptiveness to coaching. By combining the Skill/Will Matrix and thinking through how the coach’s caseload will be distributed and defined, the coach is able to focus his/her support where it is needed most. Enrollment methods can fall into three categories, iintivational, expectational and required. In this short video [Elements of the Principal/Coach Partnership](#) (view clip 0:30-4:00), educational consultant Steve Barkley describes these three categories in detail.



## Chapter Six- Coaching Program Evaluation

### Introduction

The Curriculum and Instruction Department will conduct an evaluation of The ILTexas Instructional Coaching program each school year to assess the strengths and weaknesses of the program and its alignment to the district's overall coaching goals and mission. Additionally, coaches will be provided with a tool for self-reflection. The purpose of this tool is to promote growth and not to serve as an evaluation tool. The results of both surveys will be used to monitor the efficacy of coaching across ILTexas as well as provide meaningful feedback to campus coaches regarding their individual performance and impact on their campus. This evaluation is an opportunity for district stakeholders to provide feedback for the purpose of making improvements and/or revisions to the coaching program. All coaches, teachers and campus administrators will receive a survey via email prior to Spring Break to allow time to receive feedback, analyze results, and implement plans for improvement prior to the end of the school year.

Potential program evaluation tools:

[Sample Survey](#)

[IC Self-Assessment](#)

# Resources

<b>Coach-Principal Partnership Agreement</b>	
<a href="#">Developing a partnership agreement between a coach and a principal</a>	
<b>Defined Roles and Responsibilities</b>	
<a href="#">IL Texas Instructional Leadership Roles and Responsibilities RACI Templates &amp; Tutorials</a>	
<b>Teacher Observation/Tiering Rubric (Feedback)</b>	
<a href="#">Feedback Strategies for Coaches and Administrators</a> <a href="#">Coaching for Change: Giving Feedback</a> <a href="#">Reflective Coaching Overview and Questions</a> <a href="#">Understanding the Skill/Will Matrix</a>	
<b>A Detailed Coaching Model</b>	
<a href="#">Principal as Instructional Leader: Designing a Coaching Program That Fits</a>	
<b>Coaching Program Evaluation</b>	
<a href="#">BOY/MOY/EOY Survey</a>	
<b>Instructional Coach Reflection</b>	
<a href="#">IC Self-Assessment</a>	
<b>Coaching Methods and Best Practices</b>	
<a href="#">Seven Success Factors for Great Instructional Coaching</a> <a href="#">Getting Started with Student-Centered Coaching by author Diane Sweeney</a> <a href="#">Two Approaches to Coaching</a> <a href="#">The Power of Questions in Instructional Coaching</a>	
<b>Out-of-District Resources</b>	
<a href="#">Instructional Coaching Group</a> (relationship-driven coaching) <a href="#">Elena Aguilar</a> (teacher-centered coaching) <a href="#">Diane Sweeney</a> (student-centered coaching)	<a href="#">Steve Barkley Education Consultant</a> <a href="#">EL Education</a> <a href="#">Region 4</a>
<b>Sample Coaching Guides</b>	
<a href="#">Coppell ISD</a> <a href="#">Coaching for School Improvement</a> <a href="#">Clear Creek ISD</a>	<a href="#">Pflugerville ISD IC Manual</a> <a href="#">Friendship Public Charter School</a>

## Contributors

We want to give a special thanks to all of the stakeholders who contributed to this playbook. Your hard work and dedication to improving and growing the ILTexas Instructional Coaches program is appreciated. We also want to thank the ILTexas district leadership who supported the creation and development of this playbook. Your strong leadership and culture of collaboration is bringing powerful change in our district and schools. We are better together!!!

Committees who contributed to this playbook:

- Think Tank
- Subcommittees
  - Program Evaluation
  - Roles & Descriptions/Partnership Agreement
  - Coaching Model Best Practices
  - Observation/Tiering
  - Finalize & Publish



# International Leadership of Texas



# THE MISSION

The mission of ILTexas is to prepare students for exceptional leadership roles in the international community by emphasizing servant leadership, mastering the English, Spanish, and Chinese languages, and strengthening the mind, body and character.

La misión de ILTexas es preparar a nuestros alumnos para roles de liderazgo excepcionales en la comunidad internacional, haciendo hincapié en el liderazgo de servicio, el dominio de los idiomas inglés, español y chino, y el fortalecimiento de mente, cuerpo y carácter.

德克萨斯州国际领袖学校旨在培养学生在国际社会中卓越的领导才能。我们强调学生在熟练掌握英语，西班牙语和中文的前提下加强奉献式的领导精神及身体，头脑和品德的锻炼。



# ILTexas MODIFIED ILTexas-TESS

## Texas Teacher Evaluation and Support System

A process that seeks to develop habits of continuous improvement, evidence-based feedback and professional development.

<https://tea.texas.gov>



# ILTexas T-TESS

- Non-Threatening
- Coaching
- Tool to Improve Instruction

**Note:** There are TIA ramifications: 10% Teacher evaluation (80% student growth, 10% 360 via student, peer, parent surveys)



# Our Goal/Focus

T-TESS includes three components:

1. Goal-setting and professional development
2. The evaluation cycle (pre-conference, observation, post-conference)
3. Student growth measure



# Requirements and Recommendations

- One walk-thru each 6 weeks per teacher (with feedback)
- One 45 Minute Observation (Complete before December 1st)
- Post conference within 10 business days
- Pre-conference is optional
- Summative by End-of-Year
- Teacher self-reflection ratings are recommended



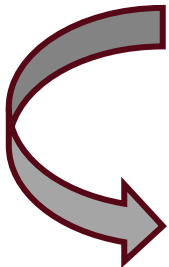
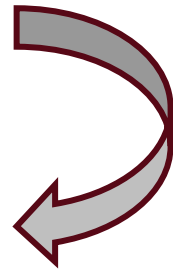
# Evaluation Cycle

## ANNOUNCED

**Pre-Conference  
(optional)**

**Observation**

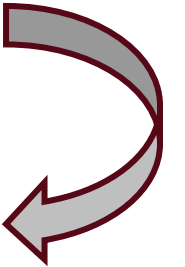
**Post-Conference**



## UNANNOUNCED

**Pre-Conference  
(optional)**

**Observation**



# ILTexas T-TESS Overview

The T-TESS Rubric includes **4 Domains** with **Dimensions** under each Domain. ILTexas' modified T-TESS domain and dimension rubrics include specific **descriptors** of practices and **5 performance levels**:

Distinguished, Accomplished,  
***Proficient***,  
Developing, and Improvement Needed

# ILTexas T-TESS Rubric Overview

Mission	Instruction	Learning Environment
<p><b>1. Leadership</b></p> <ul style="list-style-type: none"> <li>• <i>Others Before Self</i></li> <li>• Character</li> </ul> <p><b>2. Language</b></p> <ul style="list-style-type: none"> <li>• English, Spanish, Chinese</li> </ul> <p><b>3. Performance Training</b></p> <ul style="list-style-type: none"> <li>• Strengthening the Body</li> <li>• Total Fitness</li> </ul> <p><b>4. International Community</b></p> <ul style="list-style-type: none"> <li>• Global Understanding</li> <li>• Networking</li> </ul>	<ul style="list-style-type: none"> <li>• Achieving Expectations</li> <li>• Content Knowledge and Expertise</li> <li>• Communication</li> <li>• Differentiation</li> <li>• Monitor and Adjust</li> </ul>	<ul style="list-style-type: none"> <li>• Routines, and Procedures</li> <li>• Managing Student Behavior</li> <li>• Classroom Culture</li> </ul>
	<b>Planning</b>	
	<ul style="list-style-type: none"> <li>• <b>Standards and Alignment</b></li> <li>• <b>Data and Assessment</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Knowledge of Students</b></li> <li>• <b>Activities</b></li> </ul>
	<p>Powered by BoardOnTrack</p>	

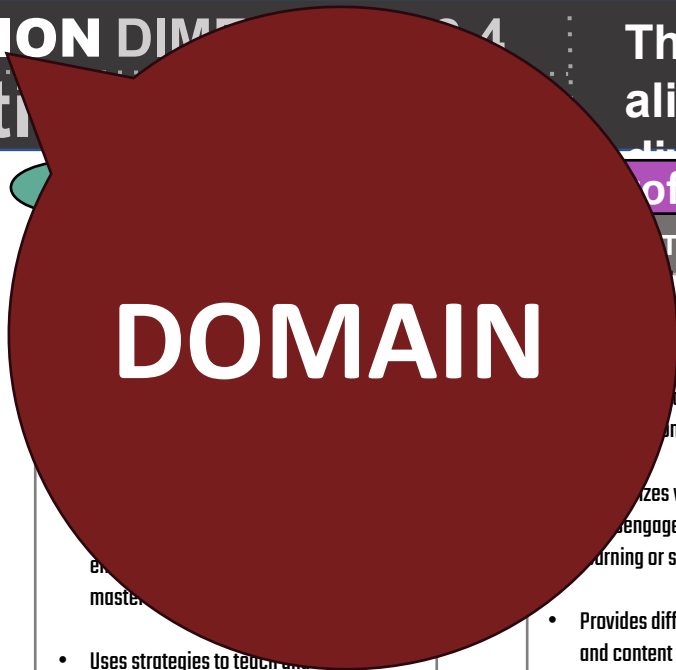


# ILTexas T-TESS Rubric

## INSTRUCTION DIMENSION 4

### Differentiated Instruction

The teacher differentiates instruction, aligning methods and techniques to



#### Distinguished

The Teacher

- Adapts lessons with a wide variety of instructional strategies to address individual needs of all students.
- Consistently monitors the quality of student participation and performance.
- Always provides differentiated instructional methods and content to ensure students have the opportunity to master what is being taught.
- Uses multiple strategies to teach and assess students.

Moves to student-centered actions

#### Proficient

The Teacher

- Consistently adapts lessons to address individual needs of all students.
- Consistently monitors the quality of student participation and performance.
- Always recognizes when students become confused or disengaged and responds to student learning or social/emotional needs.
- Provides differentiated instructional methods and content to ensure students have the opportunity to master what is being taught.

Moves to student-centered actions

#### Developing

The Teacher

- Adapts lessons to address some student needs.
- Sometimes monitors the quality of student participation and performance.
- Sometimes recognizes when students become confused or disengaged and minimally responds to student learning or social/emotional needs.
- Sometimes provides differentiated instructional methods and content.

Focuses on teacher-centered actions

#### Improvement Needed

The Teacher

- Provides one-size-fits-all lessons without meaningful differentiation.
- Rarely monitors the quality of student participation and performance.
- Does not recognize when students become confused or disengaged or does not respond appropriately to student learning or social/emotional needs.
- Rarely provides differentiated instructional methods and content.

Focuses on teacher-centered actions



# ILTexas T-TESS Rubric

## INSTRUCTION DIMENSION 2.4 Differentiation

The teacher differentiates instruction, aligning methods and techniques to

### DIMENSION

#### Distinguished

The Teacher

- Adapts lessons with a wide variety of instructional strategies to address individual needs of all students.
- Consistently monitors the quality of student participation and performance.
- Always provides differentiated instructional methods and content to ensure students have the opportunity to master what is being taught.
- Uses multiple strategies to teach and assess students.

#### Accommodating

The Teacher

- Adapts lessons to address individual needs of all students.
- Regularly monitors the quality of student participation and performance.
- Regularly provides differentiated instructional methods and content to ensure students have the opportunity to master what is being taught.
- Uses strategies to teach and assess students.

#### Proficient

The Teacher

- Adapts lessons to address some individual needs of students.
- Sometimes monitors the quality of student participation and performance.
- Sometimes recognizes when students become confused or disengaged and minimally responds to student learning or social/emotional needs.
- Sometimes provides differentiated instructional methods and content to ensure students have the opportunity to master what is being taught.

#### Developing

The Teacher

- Adapts lessons to address some student needs.
- Sometimes monitors the quality of student participation and performance.
- Sometimes recognizes when students become confused or disengaged and minimally responds to student learning or social/emotional needs.
- Sometimes provides differentiated instructional methods and content.

#### Improvement Needed

The Teacher

- Provides one-size-fits-all lessons without meaningful differentiation.
- Rarely monitors the quality of student participation and performance.
- Does not recognize when students become confused or disengaged or does not respond appropriately to student learning or social/emotional needs.
- Rarely provides differentiated instructional methods and content.

Moves to student-centered actions

Moves to student-centered actions

Focuses on mostly teacher-centered actions

Focuses on teacher-centered actions

Focuses on teacher-centered actions



# ILTexas T-TESS Rubric

## INSTRUCTION DIMENSION 2.4 Differentiation

The teacher differentiates instruction, aligning methods and techniques to diverse student needs.

### Distinguished

The Teacher

- Adapts lessons with a wide variety of instructional strategies to address individual needs of all students.
- Consistently monitors the quality of student participation and performance.
- Always provides differentiated instructional methods and content to ensure students have the opportunity to master what is being taught.
- Uses multiple strategies to teach and assess students.

### Accomplished

The Teacher

- Adapts lessons to address individual needs of all students.
- Consistently monitors the quality of student participation and performance.

### Proficient

The Teacher

- Adapts lessons to address individual needs of all students.

### Developing

The Teacher

- Adapts lessons to address some student needs.
- Sometimes monitors the quality of student participation and performance.
- Sometimes recognizes when students become confused or disengaged and minimally responds to student learning or social/emotional needs.
- Sometimes provides differentiated instructional methods and content.

### Improvement Needed

The Teacher

- Provides one-size-fits-all lessons without meaningful differentiation.
- Rarely monitors the quality of student participation and performance.
- Does not recognize when students become confused or disengaged or does not respond appropriately to student learning or social/emotional needs.
- Rarely provides differentiated instructional methods and content.

**DESCRIPTORS**

Moves to student-centered actions

Teacher-centered

Focuses on teacher-centered actions

Focuses on teacher-centered actions



# ILTexas T-TESS Rubric

## INSTRUCTION DIMENSION 2.4 Differentiation

The teacher differentiates instruction, aligning methods and techniques to diverse student needs.

### Distinguished

The Teacher

- Adapts lessons with a wide variety of instructional strategies to address individual needs of all students.
- Consistently monitors the quality of student participation and performance.
- Always provides differentiated instructional methods and content to ensure students have the opportunity to master what is being taught.
- Uses multiple strategies to teach and assess students.

### Accomplished

The Teacher

- Adapts lessons to address individual needs of all students.
- Regularly monitors the quality of student participation and performance.
- Regularly provides differentiated instructional methods and content to ensure students have the opportunity to master what is being taught.
- Uses strategies to teach and assess students.

### Proficient

The Teacher

- Adapts lessons to address individual needs of all students.
- Regularly monitors the quality of student participation and performance.

### Developing

The Teacher

- Adapts lessons to address some student needs.
- Sometimes monitors the quality of student participation and performance.
- Sometimes recognizes when students become confused or disengaged and responds to student learning or social/emotional needs.
- Sometimes provides differentiated instructional methods and content.

### Improvement Needed

The Teacher

- Provides one-size-fits-all lessons without meaningful differentiation.
- Rarely monitors the quality of student participation and performance.
- Does not recognize when students become confused or disengaged or does not respond appropriately to student learning or social/emotional needs.
- Rarely provides differentiated instructional methods and content.

**PERFORMANCE LEVELS**



# Collective Evidence is Essential

**Detailed Collection of Evidence:** *Unbiased* notes of what occurs during a classroom lesson, but for some domains/dimensions you can include artifacts/observations from PLCs, conference with you, etc.

- Capture:
  - what the teacher says
  - what the teacher does
  - what the students say
  - what the students do
- Copy wording from visuals used during the lesson.
- Record time segments of lesson.

The collection of detailed evidence is ESSENTIAL for the observation process to be implemented accurately, fairly, and for the intended purpose of the process.

# T-TESS THOUGHTS...

- ✓ The 'Proficient' performance level is representative of a 'Rock **Solid**' teacher.
- ✓ There will be some necessary culture shifts to establish a new mind set for the relationship with appraisals and supporting teachers.
- ✓ Everyone in the school community is a public learner.
- ✓ The ultimate outcome is improved student achievement (toward the ILTexas mission).
- ✓ **This is a “Coaching” tool designed to aid teachers in helping students achieve mastery of learning!!**

# ILTexas MODIFIED T-TESS THOUGHTS...

**\*Go to Modified ILTexas-TESS Rubric:**

<https://docs.google.com/spreadsheets/d/1LgLyvq8ueQjYxLVtDVoEA7DEaNE1m-8Z1JBZDtLcA/edit?usp=sharing>

# Four Domains:

1. Planning
2. Instruction
3. Learning Environment
4. ILTexas Mission



# Domain 1: Planning

**One of the main precursors** of a successful lesson is a well-developed lesson plan.

ILTexas C&I Resources & PLC Framework guides the teacher to plan by working through: (1) What are students expected to learn/know (K+S) (2) How will we know they've learned it, (3) What do we do when they don't and (4) What do we do when they have?

# PLC's Four Questions... Through the Eyes of Students:

1) What do you want us to know?

\*Framing the lesson

2) How can we show you we have learned it? \*in the target language

3) What can we do if we struggle to learn it?

4) What can we do if we already know it?

# Domain 1: Planning

Dimension 1.1: Standards and Alignment

Dimension 1.2: Data and Assessment

Dimension 1.3: Knowledge of Students

Dimension 1.4: Activities

# Planning Domain 1

## Dimension 1.1: Standards and Alignment



# Planning Domain 1

## Dimension 1.2: Data and Assessment

### PLANNING DIMENSION 1.2 Data and Assessment

The teacher uses formal and informal methods to measure student progress, then manages and analyzes student data to inform instruction.  
Standards Basis: 1B, 1F, 2B, 2C, 5A, 5B, 5C, 5D

Distinguished

Accomplished

Proficient

Developing

Improvement Needed

STUDENT-CENTERED ACTIONS

TEACHER-CENTERED ACTIONS

# Planning Domain 1

## Dimension 1.3: Knowledge of Students

### PLANNING DIMENSION 1.3 Knowledge of Students

Through knowledge of students and proven practices, the teacher ensures high levels of learning, social-emotional development and achievement for all students.  
Standards Basis: 1A, 1B, 1C, 2A, 2B, 2C

**Distinguished**

**Accomplished**

**Proficient**

**Developing**

**Improvement Needed**

STUDENT-CENTERED ACTIONS ←

TEACHER-CENTERED ACTIONS →

**Instructional Planning Includes:**

- All lessons that connect to students' prior knowledge, experiences, interests and future

**Instructional Planning Includes:**

- All lessons that connect to students' prior knowledge, experiences and future learning

**Instructional Planning Includes:**

- All lessons that connect to students' prior knowledge and experiences.

**Instructional Planning Includes:**

- Most lessons that connect to students' prior knowledge and experiences.

**Instructional Planning Includes:**

- Few lessons that connect to students' prior knowledge and experiences.

# Planning Domain 1

## Dimension 1.4: Activities

### PLANNING DIMENSION 1.4

#### Activities

The teacher plans engaging, flexible lessons that encourage higher-order thinking, persistence and achievement.

Standards Basis: 1B, 1C, 1D, 1E

#### Distinguished

#### Accomplished

#### Proficient

#### Developing

#### Improvement Needed

STUDENT-CENTERED ACTIONS ←

TEACHER-CENTERED ACTIONS →

##### Instructional Planning Includes:

- Opportunities for students to generate questions that lead to further inquiry and promote complex, higher-order thinking.

##### Instructional Planning Includes:

- Questions that encourage all students to engage in complex, higher-order thinking and problem solving.

##### Instructional Planning Includes:

- Questions that encourage all students to engage in complex, higher-order thinking.
- Instructional groups based on the

##### Instructional Planning Includes:

- Questions that promote limited, predictable or rote responses and encourage some complex, higher-order thinking.

##### Instructional Planning Includes:

- Encourages little to no complex, higher-order thinking.
- Instructional groups based on the needs of a few students.

# Jigsaw Activity: Engage in content





# It is ALL about the EVIDENCE



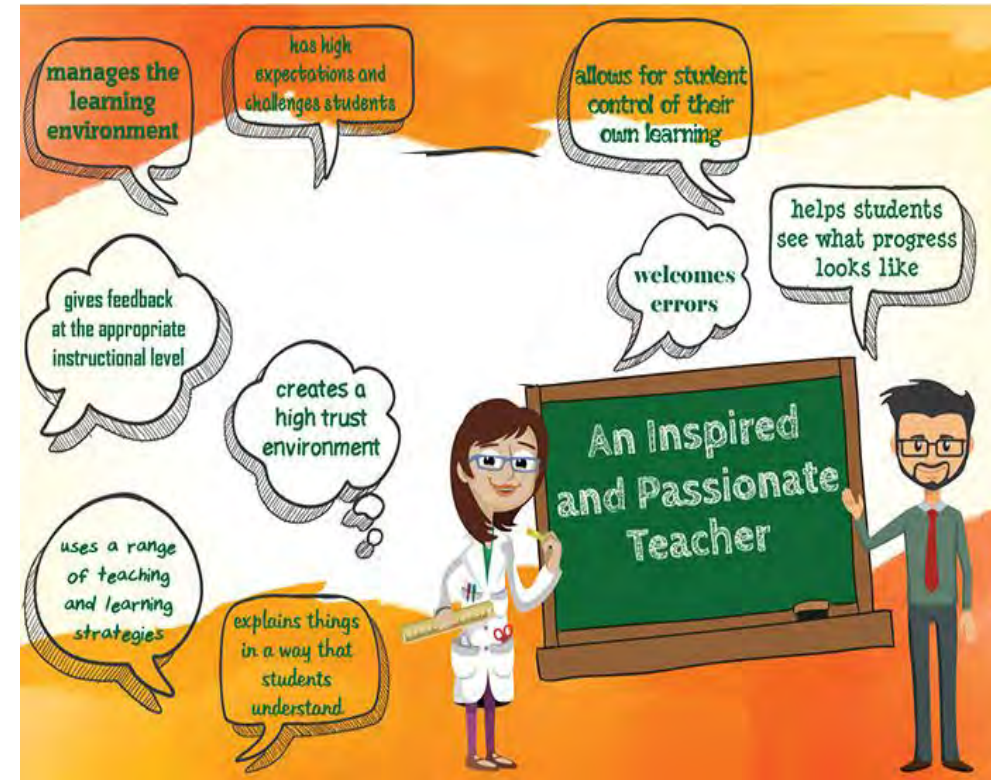
# DOMAIN II - INSTRUCTION

## DIMENSION 2.1 ACHIEVING EXPECTATIONS

Supports ALL learners in their pursuit of high levels of academic and soc-emotional success (PBIS).

Descriptors...

- **High Academic Expectations** for all
- Persists w/lesson until it is evidence that most **students have mastered**
- Addresses students' mistakes and follows through **mastery**
- Provides students **with opportunities** to take initiative on their learning



# DOMAIN II - INSTRUCTION

## DIMENSION 2.1 ACHIEVING EXPECTATIONS

Supports ALL learners in their pursuit of high levels of academic and soc-emotional success (PBIS).

In the learning...

- Direct modeling, concrete examples
- Understands what students are expected to know and do prior to lesson delivery
- **Scaffold instruction and resources to reach all learners**
- Anticipate knowledge, actions and behaviors that need to be observed to reach mastery



# DOMAIN II - INSTRUCTION

## DIMENSION 2.2 CONTENT KNOWLEDGE & EXPERTISE

Design and execute lessons aligned with state standards, related content and student needs.

Descriptors...

- Teaches correct **content/objective**
- Integrates learning other disciplines
- Anticipates possible misunderstandings
- Provides opportunities to **use different types of thinking**
- Able to reflect how lesson fits in with state standards



# DOMAIN II - INSTRUCTION

## DIMENSION 2.2 CONTENT KNOWLEDGE & EXPERTISE

Design and execute lessons aligned with state standards, related content and student needs.

In the learning...

- Lesson organized and sequenced to build on prior knowledge and promote higher order thinking
- Know students' gaps, **misconceptions**, **preconceptions** prior to lesson delivery to address them
- Includes cross-disciplinary and real-world connections
- **Ample opportunities** to engage problem solving individually and collectively



# DOMAIN II - INSTRUCTION

## DIMENSION 2.3 COMMUNICATION

**Clearly and accurately communicates to support persistence, deeper learning and effective effort.**

**Descriptors...**

- **Two-way communication**
- **Recognizes misunderstandings and responds** with techniques to clarify concepts



# DOMAIN II - INSTRUCTION

## DIMENSION 2.3 COMMUNICATION

Clearly and accurately communicates to support persistence, deeper learning and effective effort.

In the learning...

- **Opportunities to encourage all students to communicate** to teacher and peers
- **Safe place that encourages discussion** without fear
- Recognizes confusion/misunderstanding and responds to **adjusting** instruction on the spot
- Instructional strategies addresses **all** learning modalities
- Utilizes wait time and probes students to higher order thinking
- Encourages **student** discourse



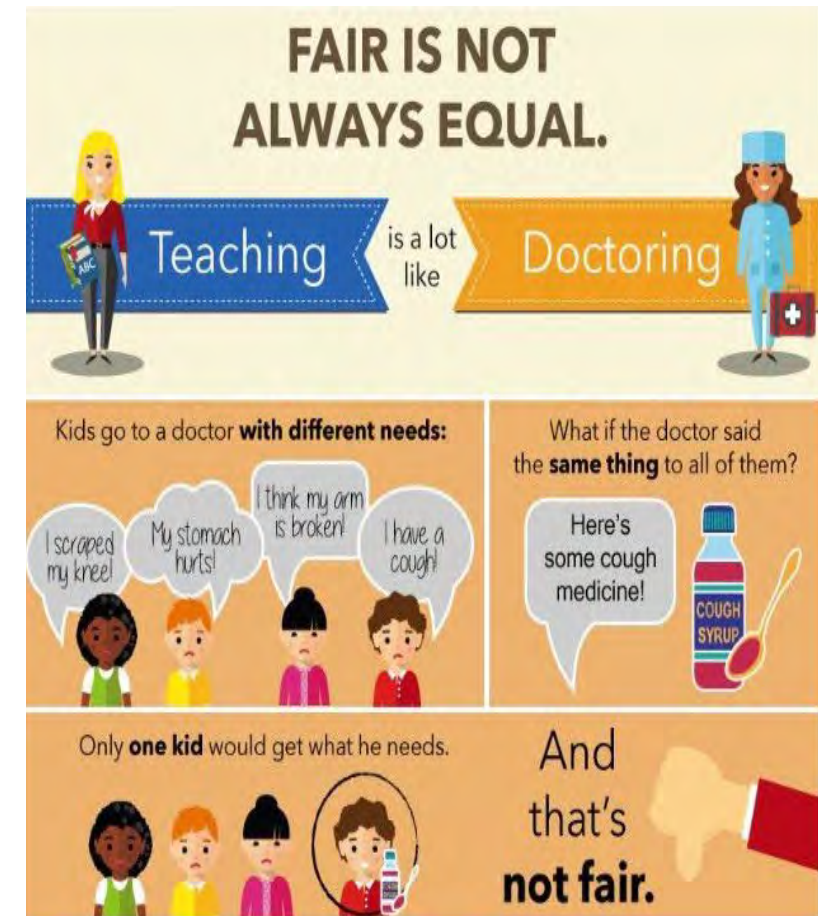
# DOMAIN II - INSTRUCTION

## DIMENSION 2.4 DIFFERENTIATION

Differentiates instruction, aligning methods and techniques to diverse student needs.

Descriptors...

- **Differentiated instruction** for all
- **Monitors** quality of participation and performance
- Differentiated instruction **for all**
- **Prevents** confusion/disengagement by ensuring differentiation





# DOMAIN II - INSTRUCTION

## DIMENSION 2.4 DIFFERENTIATION

Differentiates instruction, aligning methods and techniques to diverse student needs.

In the learning...

- Understands the diverse needs of all students, **plans lesson to address their needs and ability levels**
- Monitors participation and performance and ensures engagement
- **Scaffolds instructional methods** and resources to provide every student the opportunity for mastery
- **Recognizes when students are confused, disengaged, bored, frustrated, not participating, etc.** and adjusts lesson delivery



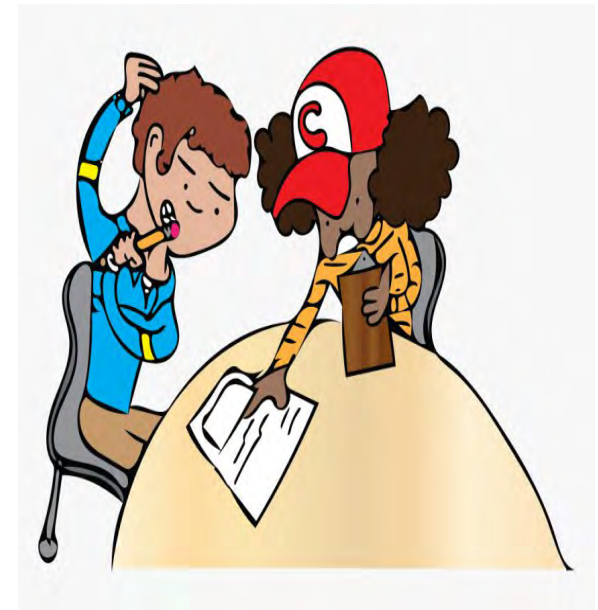
# DOMAIN II - INSTRUCTION

## DIMENSION 2.5 MONITOR & ADJUST

**Formally and informally collects, analyzes and uses student progress data and makes needed lesson adjustments.**

**Descriptors...**

- **Input from students to monitor and adjust instruction and activities**
- **Adjusts instruction and activities to maintain engagement**
- **Monitor students' behavior/responses for engagement and understanding**



# DOMAIN II - INSTRUCTION

## DIMENSION 2.5 MONITOR & ADJUST

Formally and informally collects, analyzes and uses student progress data and makes needed lesson adjustments.

In the learning...

- Various forms of informal assessments throughout lesson
- Uses data from informal assessments to adjust lesson on the spot
- Pause points for check for understanding
- Alignment of activities that measures mastery of lesson



# DOMAIN II - INSTRUCTION

## DIMENSION 2.1 ACHIEVING EXPECTATIONS

	DISTINGUISHED	ACCOMPLISHED	PROFICIENT	DEVELOPING	IMPROVEMENT NEEDED
<p>The teacher supports all learners in their pursuit of high academic and social-emotional success/PBIS.</p>	<ul style="list-style-type: none"> <li>•Persists with the lesson until there is evidence (ie, Skyward, data wall, etc) that all students demonstrate mastery of the objective.</li> <li>•Provides opportunities for students to self-monitor and self-correct mistakes.</li> <li>•Systematically enables students to set goals for themselves and monitor their progress over time.</li> </ul>	<ul style="list-style-type: none"> <li>•Persists with the lesson until there is evidence (ie, Skyward, data wall, etc) that most students demonstrate mastery of the objective.</li> <li>•Anticipates student mistakes and encourages students to avoid common learning pitfalls.</li> <li>•Establishes systems where students take initiative of their own learning and self-monitor.</li> </ul>	<ul style="list-style-type: none"> <li>•Persists with the lesson until there is evidence (ie, Skyward, data wall, etc) that most students demonstrate mastery of the objective.</li> <li>•Addresses student mistakes and follows through to ensure student mastery.</li> </ul>	<ul style="list-style-type: none"> <li>• Persists with the lesson until there is evidence(ie, Skyward) that some students demonstrate mastery of the objective.</li> <li>• Sometimes addresses student mistakes.</li> </ul>	<ul style="list-style-type: none"> <li>• Concludes the lesson even though there is evidence that few students demonstrate mastery of the objective.</li> <li>• Allows student mistakes to go unaddressed or confronts student errors in a way that discourages further effort.</li> </ul>

# DOMAIN II - INSTRUCTION

## DIMENSION 2.2 CONTENT KNOWLEDGE AND EXPERTISE

The teacher uses content and pedagogical expertise/program design and execute lessons aligned with state standards/ILTexas Pacing, related content and student needs

DISTINGUISHED	ACCOMPLISHED	PROFICIENT	DEVELOPING	IMPROVEMENT NEEDED
<ul style="list-style-type: none"> <li>•Integrates learning objectives with other disciplines, content areas and real-world experience.</li> <li>•Consistently anticipates possible misunderstandings and proactively develops teaching techniques to mitigate concerns.</li> <li>•Sequences instruction that allows students to understand how the lesson fits within the structure of the discipline, the state standards, related content and</li> </ul>	<ul style="list-style-type: none"> <li>•Integrates learning objectives with other disciplines and real-world experiences.</li> <li>•Anticipates possible student misunderstandings and proactively develops teaching techniques to mitigate concerns.</li> <li>•Sequences instruction that allows students to understand how the lesson fits within the structure of the discipline and the state standards</li> </ul>	<ul style="list-style-type: none"> <li>•Conveys accurate content knowledge in multiple contexts as evidenced through CO/LO.</li> <li>•Integrates learning objectives with other disciplines.</li> <li>•Anticipates possible student misunderstandings.</li> <li>•Provides opportunities for students to use different types of thinking (e.g., analytical, practical, creative and research-based) and in the target language</li> </ul>	<ul style="list-style-type: none"> <li>•Conveys accurate content knowledge.</li> <li>•Sometimes integrates learning objectives with other disciplines.</li> <li>•Sometimes anticipates possible student misunderstandings.</li> </ul>	<ul style="list-style-type: none"> <li>•Conveys inaccurate content knowledge that leads to student confusion.</li> <li>•Rarely integrates learning objectives with other disciplines.</li> <li>•Does not anticipate possible student misunderstandings</li> </ul>

# DOMAIN II - INSTRUCTION

## DIMENSION 2.3 COMMUNICATION

The teacher clearly and accurately communicates to support persistence, deeper learning and effective effort.

DISTINGUISHED	ACCOMPLISHED	PROFICIENT	DEVELOPING	IMPROVEMENT NEEDED
<ul style="list-style-type: none"> <li>•Provides explanations that are clear and coherent and uses verbal and written communication that is clear and correct.</li> <li>•Asks questions at the creative, evaluative and/or analysis levels that require a deeper learning and broader understanding of the objective of the lesson.</li> <li>•Skillfully provokes and guides discussion to pique curiosity and inspire student-led learning.</li> </ul>	<ul style="list-style-type: none"> <li>•Anticipates possible student misunderstandings and proactively develops techniques to address obstacles to learning.</li> <li>•Provides explanations that are clear and coherent and uses verbal and written communication that is clear and correct.</li> <li>•Asks questions at the creative, evaluative and/or analysis levels that focus on the objective of the lesson and provoke thought and discussion.</li> <li>•Provides wait time when questioning students.</li> </ul>	<ul style="list-style-type: none"> <li>•Practices that provide opportunities for most students to communicate effectively with the teacher and their peers.</li> <li>•Recognizes student misunderstandings and responds with an array of teaching techniques to clarify concepts.</li> <li>•Provides explanations that are clear and uses verbal and written communication that is clear and correct.</li> <li>•Asks remember, understand and apply level questions that focus on the objective of the lesson and provoke discussion.</li> <li>•Uses probing questions to clarify and elaborate</li> </ul>	<ul style="list-style-type: none"> <li>•Leads lessons with some opportunity for dialogue, clarification or elaboration.</li> <li>•Recognizes student misunderstandings but has a limited ability to respond.</li> <li>•Uses verbal and written communication that is generally clear with minor errors of grammar.</li> <li>•Asks remember and understand level questions that focus on the objective of the lesson but do little to amplify discussion.</li> </ul>	<ul style="list-style-type: none"> <li>•Directs lessons with little opportunity for dialogue, clarification or elaboration.</li> <li>•Is sometimes-unaware of or unresponsive to student misunderstandings.</li> <li>•Rarely asks questions or asks questions that do not amplify discussion or align to the objective of the lesson.</li> </ul>

# DOMAIN II - INSTRUCTION

## DIMENSION 2.4 DIFFERENTIATION

The teacher differentiates instruction, aligning methods and techniques to diverse student needs.

DISTINGUISHED	ACCOMPLISHED	PROFICIENT	DEVELOPING	IMPROVEMENT NEEDED
<ul style="list-style-type: none"> <li>•Adapts lessons with a wide variety of instructional strategies to address individual needs of all students and language levels..</li> <li>•Consistently monitors the quality of student participation and performance.</li> <li>•Always provides differentiated instructional methods and content to ensure students have the opportunity to master what is being taught.</li> <li>•Consistently prevents student confusion or disengagement by addressing learning and/or social/emotional needs of all students.</li> </ul>	<ul style="list-style-type: none"> <li>•Adapts lessons to address individual needs of all students and language levels..</li> <li>•Regularly monitors the quality of student participation and performance.</li> <li>•Regularly provides differentiated instructional methods and content to ensure students have the opportunity to master what is being taught.</li> <li>•Proactively minimizes student confusion or disengagement by addressing learning and/or social/emotional needs of all students.</li> </ul>	<ul style="list-style-type: none"> <li>•Adapts lessons to address individual needs of all students and language levels.</li> <li>•Regularly monitors the quality of student participation and performance.</li> <li>•Provides differentiated instructional methods and content to ensure students have the opportunity to master what is being taught.</li> <li>•Recognizes when students become confused or disengaged and responds to student social/emotional needs.</li> </ul>	<ul style="list-style-type: none"> <li>•Adapts lessons to address some student needs and language levels.</li> <li>•Sometimes monitors the quality of student participation and performance.</li> <li>•Sometimes provides differentiated instructional methods and content.</li> <li>•Sometimes recognizes when students become confused or disengaged and minimally responds to student learning or social/emotional needs.</li> </ul>	<ul style="list-style-type: none"> <li>•Provides one-size-fits- all lessons without meaningful differentiation.</li> <li>•Rarely monitors the quality of student participation and performance.</li> <li>•Does not recognize when students become confused or disengaged or does not respond appropriately to student learning or social/ emotional needs.</li> </ul>

# DOMAIN II - INSTRUCTION

## DIMENSION 2.5 MONITOR AND ADJUST

The teacher formally and informally collects, analyzes and uses student progress data and makes needed lesson adjustments.

DISTINGUISHED	ACCOMPLISHED	PROFICIENT	DEVELOPING	IMPROVEMENT NEEDED
<ul style="list-style-type: none"> <li>•Systematically gathers input from students in order to monitor and adjust instruction, activities or pacing to respond to differences in student needs.</li> <li>•Adjusts instruction and activities to maintain student engagement.</li> <li>•Uses discreet and explicit checks for understanding through questioning and academic feedback.</li> </ul>	<ul style="list-style-type: none"> <li>•Utilizes input from students in order to monitor and adjust instruction, activities and pacing to respond to differences in student needs.</li> <li>•Adjusts instruction and activities to maintain student engagement.</li> <li>•Continually checks for understanding through purposeful questioning and academic feedback.</li> </ul>	<ul style="list-style-type: none"> <li>•Consistently invites input from students in order to monitor and adjust instruction and activities.</li> <li>•Adjusts instruction and activities to maintain student engagement.</li> <li>•Monitors student behavior and responses for engagement and understanding.</li> </ul>	<ul style="list-style-type: none"> <li>•Sometimes utilizes input from students in order to monitor and adjust instruction and activities.</li> <li>•Adjusts some instruction within a limited range.</li> <li>•Sees student behavior but misses some signs of disengagement.</li> <li>•Is aware of most student responses but misses some clues of misunderstanding.</li> </ul>	<ul style="list-style-type: none"> <li>•Persists with instruction or activities that do not engage students.</li> <li>•Generally does not link student behavior and responses with student engagement and understanding.</li> <li>•Makes no attempts to engage students who appear disengaged or disinterested.</li> </ul>



## **DOMAIN II – INSTRUCTION Activity**

**For each assigned dimension...**

- **Review the video and determine the teacher's proficiency level.**
- **Compare your rated proficiency level to T-Tess Calibration Sheet.**
- **Develop a plan that will help develop the teacher's capacity in the area(s) of deficiency.**

# DOMAIN II – INSTRUCTION

## Activity

### Break Out Groups and Assignments

Break Out Groups	Dimension	Video Link	Video to Watch	Calibration Link
K-2	2.1	<a href="https://www.teachfortexas.org/Views/Resources">https://www.teachfortexas.org/Views/Resources</a>	2ND MAKING PREDICTIONS	<a href="https://www.teachfortexas.org/Resource_Files/Calibration/2nd_Grade_ELA_Making_Predictions_Lessons_Ratings.pdf">https://www.teachfortexas.org/Resource_Files/Calibration/2nd_Grade_ELA_Making_Predictions_Lessons_Ratings.pdf</a>
3-5	2.2		4TH ELA CHARACTER TRAITS	<a href="https://www.teachfortexas.org/Resource_Files/Calibration/4th_Grade_ELA_Identifying_Character_Traits_Lessons_Ratings.pdf">https://www.teachfortexas.org/Resource_Files/Calibration/4th_Grade_ELA_Identifying_Character_Traits_Lessons_Ratings.pdf</a>
6-8	2.4		6TH MATH	<a href="https://www.teachfortexas.org/Resource_Files/Calibration/6th_Grade_Math_Lessons_Ratings.pdf">https://www.teachfortexas.org/Resource_Files/Calibration/6th_Grade_Math_Lessons_Ratings.pdf</a>
HS	2.5		HS AP CHEMISTRY	<a href="https://www.teachfortexas.org/Resource_Files/Calibration/High_School_AP_Chemistry_Lessons_Ratings.pdf">https://www.teachfortexas.org/Resource_Files/Calibration/High_School_AP_Chemistry_Lessons_Ratings.pdf</a>

# DOMAIN III – LEARNING ENVIRONMENT

## DIMENSION 3.1 CLASSROOM ENVIRONMENT, ROUTINES AND PROCEDURES

**The teacher organizes a safe, accessible and efficient classroom for ALL learners in the target language.**

**Attributes...**

- **Procedures, routines and transitions are posted, clear and efficient**
- **Students actively participate in groups, manage supplies and equipment with limited teacher direction.**
- **The classroom is safe and organized to support learning objectives and is accessible to all-students.**



# DOMAIN III – LEARNING ENVIRONMENT

## DIMENSION 3.1 CLASSROOM ENVIRONMENT, ROUTINES AND PROCEDURES

LEARNING ENVIRONMENT					
Classroom Environment, Routines and Procedures (Dimension 3.1)					
Dimension 3.1	DISTINGUISHED	ACCOMPLISHED	PROFICIENT	DEVELOPING	IMPROVEMENT NEEDED
<p><b>Classroom Environment, Routines and Procedures (in target language):</b> The teacher organizes a safe, accessible and efficient classroom.</p> <p><b>Standards Basis:</b> 1D, 4A, 4B, 4C, 4D</p> <p><b>Potential Sources of Evidence:</b> Conferences and conversations with the teacher; formal observations and walkthroughs; classroom artifacts; analysis of student data</p>	<ul style="list-style-type: none"> <li>● Establishes and uses effective routines, transitions and procedures that primarily rely on student leadership and responsibility.</li> <li>● Students take primary leadership and responsibility for managing student groups, supplies, and/or equipment.</li> <li>● The classroom is safe and thoughtfully designed to engage, challenge and inspire students to participate in high-level learning beyond the learning objectives.</li> </ul>	<ul style="list-style-type: none"> <li>● Establishes and uses effective routines, transitions and procedures that she or he implements effortlessly.</li> <li>● Students take some responsibility for managing student groups, supplies and/or equipment.</li> <li>● The classroom is safe, inviting and organized to support learning objectives and is accessible to all students.</li> </ul>	<ul style="list-style-type: none"> <li>● All procedures, routines and transitions are posted, clear and efficient.</li> <li>● Students actively participate in groups, manage supplies and equipment with very limited teacher direction.</li> <li>● The classroom is safe and organized to support learning objectives and is accessible to all-students.</li> </ul>	<ul style="list-style-type: none"> <li>● Most procedures, routines and transitions provide clear direction but others are unclear and inefficient.</li> <li>● Students depend on the teacher to direct them in managing student groups, supplies and/or equipment.</li> <li>● The classroom is safe and accessible to most students, but is disorganized and cluttered.</li> </ul>	<ul style="list-style-type: none"> <li>● Few procedures and routines guide student behavior and maximize learning. Transitions are characterized by confusion and inefficiency.</li> <li>● Students often do not understand what is expected of them.</li> <li>● The classroom is unsafe, disorganized and uncomfortable.</li> <li>● Some students are not able to access materials.</li> </ul>

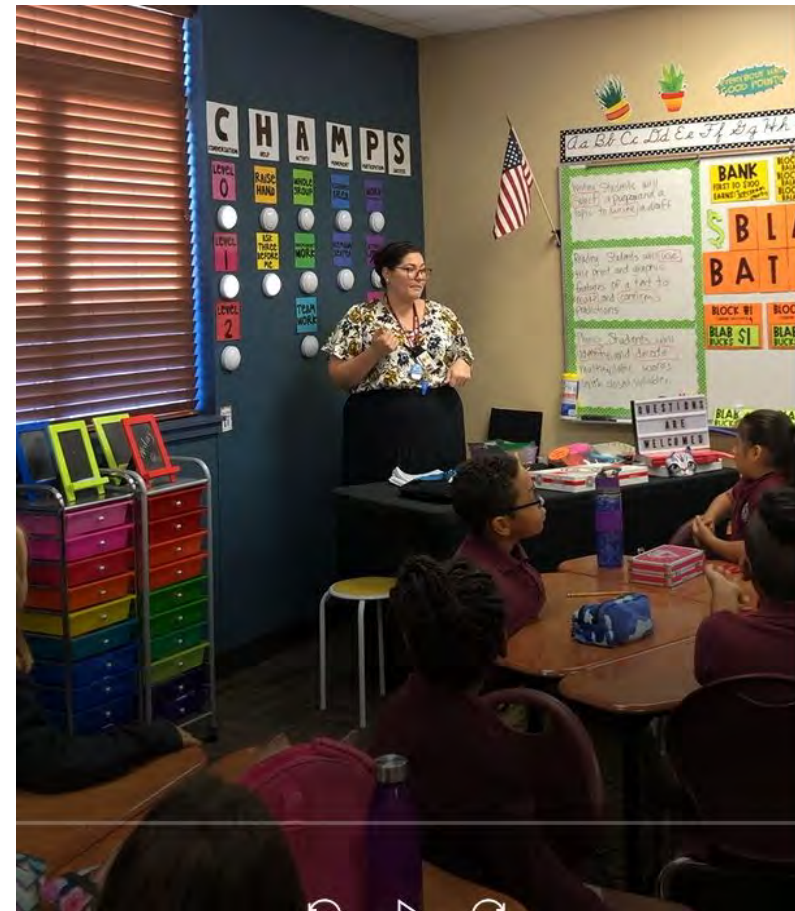


# DOMAIN III – LEARNING ENVIRONMENT

## DIMENSION 3.1 CLASSROOM

### ENVIRONMENT, ROUTINES AND PROCEDURES

SEE IT!



# **DOMAIN III – LEARNING ENVIRONMENT**

## **DIMENSION 3.1 CLASSROOM ENVIRONMENT, ROUTINES AND PROCEDURES**

Go to [www.menti.com](http://www.menti.com) and use the code **42 55 84**

**Determine key words or phrases within the descriptors that would move the performance level from Proficient to Accomplished?**

# DOMAIN III – LEARNING ENVIRONMENT

## DIMENSION 3.2 MANAGING STUDENT BEHAVIOR

**The teacher establishes, communicates and maintains clear expectations for student behavior**  
**Attributes...**

- **Consistently implements the campus and/ or classroom behavior system proficiently**
- **Most students meet expected classroom behavior standard.**





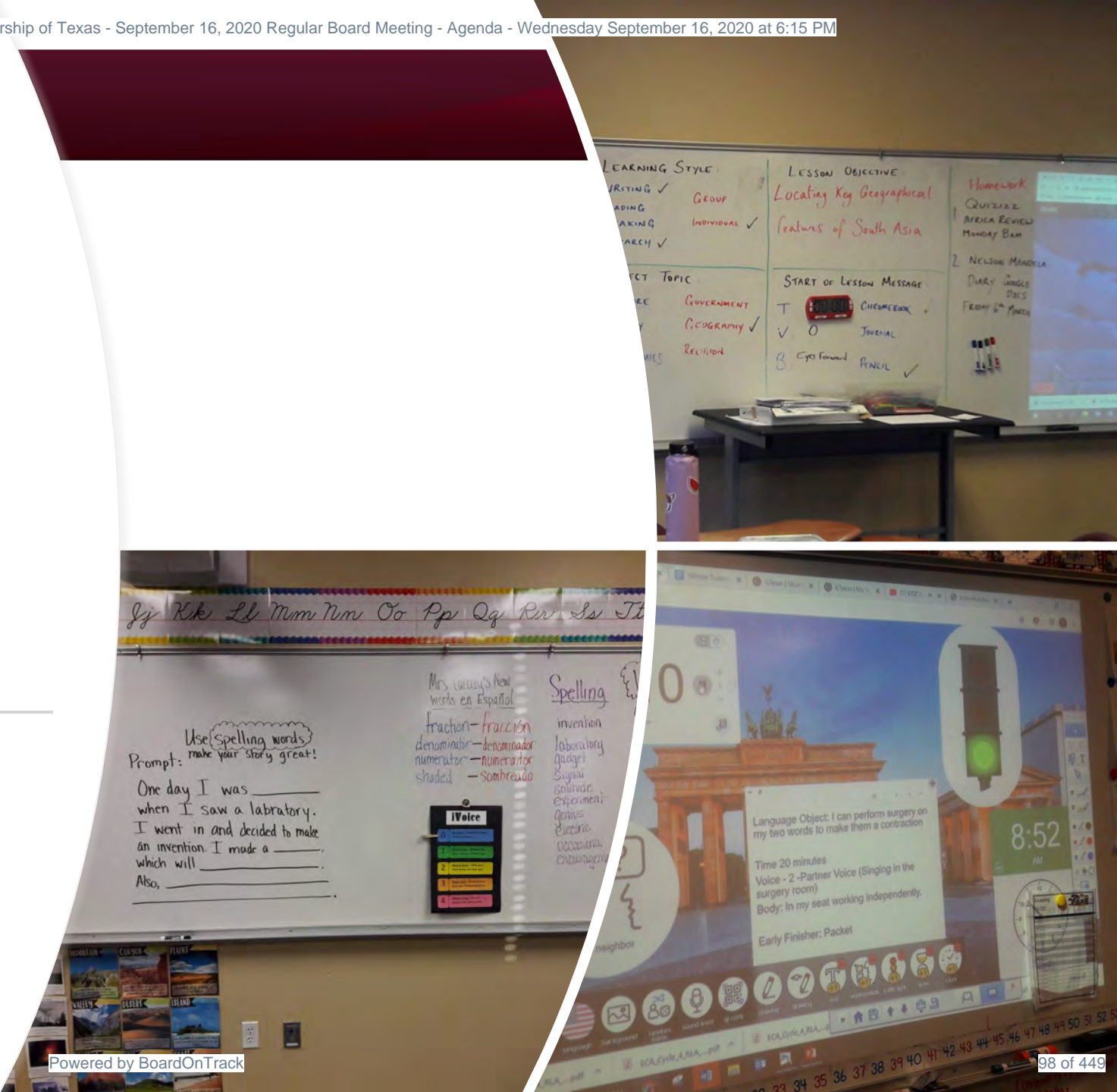
# DOMAIN II – LEARNING ENVIRONMENT

## DIMENSION 3.2 MANAGING STUDENT BEHAVIOR

LEARNING ENVIRONMENT					
Managing Student Behavior (Dimension 3.2)					
	DISTINGUISHED	ACCOMPLISHED	PROFICIENT	DEVELOPING	IMPROVEMENT NEEDED
<p><b>Dimension 3.2</b> <b>Managing Student Behavior:</b> The teacher establishes, communicates and maintains clear expectations for student behavior.</p> <p><b>Standards Basis:</b> 4A, 4B, 4C, 4D</p> <p><b>Potential Sources of Evidence:</b>  Posted Student Expectations/ Anchor Charts, TVB, Restorative Discipline, Conferences and conversations with the teacher; formal observations and walkthroughs; classroom artifacts; analysis of student data</p>	<ul style="list-style-type: none"> <li>Consistently monitors behavior subtly, reinforces positive behaviors appropriately and intercepts misbehavior fluidly <a href="#">GBF Management Hierarchy Videos</a></li> <li>Students and the teacher create, adopt and maintain classroom behavior standards (TLAC techniques).</li> </ul>	<ul style="list-style-type: none"> <li>Consistently encourages and monitors student behavior subtly and responds to misbehavior swiftly <a href="#">GBF Management Hierarchy Videos</a></li> <li>Most students know, understand and respect classroom behavior <u>standard</u> (TLAC techniques).</li> </ul>	<ul style="list-style-type: none"> <li>Consistently implements the campus and/or classroom behavior system proficiently <a href="#">GBF Management Hierarchy Videos</a></li> <li>Most students meet expected classroom behavior standards (TLAC techniques).</li> </ul>	<ul style="list-style-type: none"> <li>Inconsistently implements the campus and/or classroom behavior system.</li> <li>Student failure to meet expected classroom behavior standards interrupts learning.</li> </ul>	<ul style="list-style-type: none"> <li>Rarely or unfairly enforces campus or classroom behavior standards.</li> <li>Student behavior impedes learning in the classroom.</li> </ul>

# DOMAIN III – LEARNING ENVIRONMENT

## DIMENSION 3.2 MANAGING STUDENT BEHAVIOR



# DOMAIN III – LEARNING ENVIRONMENT

## DIMENSION 3.2 MANAGING

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## STUDENT BEHAVIOR

[SEE IT!](#)



Nosotros lo hacemos (We do)

Yo veo...

Yo infiero...

6:42 / 1:25:03

The video player displays a presentation slide with a green and white background. The slide features the text 'Nosotros lo hacemos (We do)' in red and blue, 'Yo veo...' in red, and 'Yo infiero...' in red. Below the text are three small video thumbnails: one showing a person covering their eyes, one showing a person looking at a screen, and one showing a person looking at a screen. The main illustration shows three children playing in a pile of autumn leaves. The video player interface at the bottom shows a play button, a volume icon, and a progress bar indicating 6:42 / 1:25:03. There are also icons for closed captions, settings, and a full screen button.

# **DOMAIN II – LEARNING ENVIRONMENT**

## **DIMENSION 3.2 MANAGING STUDENT BEHAVIOR**

Go to [www.menti.com](http://www.menti.com) and use the code **42 55 84**

**Determine key words or phrases within the descriptors that would move the performance level from Proficient to Accomplished?**

# DOMAIN III – LEARNING ENVIRONMENT

## DIMENSION 3.3 CLASSROOM CULTURE

**The teacher leads a mutually respectful and collaborative class of actively engaged learners.**

**Attributes...**

- **Students engaged in relevant, meaningful learning**
- **Students work respectfully individually and in groups (Others Before Self).**
- **Most students exhibit the 3Bs most of the time.**



# DOMAIN III – LEARNING ENVIRONMENT

## DIMENSION 3.3 CLASSROOM CULTURE

LEARNING ENVIRONMENT Classroom Culture (Dimension 3.3)					
Dimension 3.3 Classroom Culture: The teacher leads a mutually respectful and collaborative class of actively engaged learners.	DISTINGUISHED	ACCOMPLISHED	PROFICIENT	DEVELOPING	IMPROVEMENT NEEDED
<p><b>Standards Basis:</b> 1E, 1F, 3B, 4C, 4D, 5A, 5B, 5D</p> <p><b>Potential Sources of Evidence:</b> Others Before Self, PBIS, 3Bs, Restorative Discipline, Conferences and conversations with the teacher; formal observations and walkthroughs; classroom artifacts; analysis of student data</p>	<ul style="list-style-type: none"> <li>Consistently engages all students with relevant, meaningful learning based on their interests and abilities to create a positive rapport amongst students.</li> <li>Students collaborate positively and encourage each other's efforts and achievements (Others Before Self).</li> <li>All students exhibit the 3Bs all of the time.</li> </ul>	<ul style="list-style-type: none"> <li>Engages all students with relevant, meaningful learning, sometimes adjusting lessons based on student interests and abilities.</li> <li>Students collaborate positively with each other and the teacher (Others Before Self).</li> <li>All students exhibit the 3Bs most of the time.</li> </ul>	<ul style="list-style-type: none"> <li>Engages all students in relevant, meaningful learning.</li> <li>Students work respectfully individually and in groups. (Others Before Self).</li> <li>Most students exhibit the 3Bs most of the time.</li> </ul>	<ul style="list-style-type: none"> <li>Establishes a learning environment where most students are engaged in the curriculum.</li> <li>Students are sometimes disrespectful of each other.</li> </ul>	<ul style="list-style-type: none"> <li>Establishes a learning environment where few students are engaged in the curriculum.</li> <li>Students are disrespectful of each other and of the teacher.</li> </ul>

**DOMAIN III – LEARNING ENVIRONMENT  
DIMENSION 3.3 CLASSROOM CULTURE**

**SEE IT! NAME IT!**



# **DOMAIN III – LEARNING ENVIRONMENT**

## **DIMENSION 3.3 CLASSROOM CULTURE**

Go to [www.menti.com](http://www.menti.com) and use the code **42 55 84**

**Determine key words or phrases within the descriptors that would move the performance level from Proficient to Accomplished?**



# **DOMAIN I - IV – INSTRUCTION Activity**

**For each Dimension...**

- **Determine key words that separate each proficiency level.**
- **Locate verbs that should be performed.**

# Overview: ILTexas Modified TTESS

DIMENSION EXAMPLE:	Distinguished	Accomplished	Proficient	Developing	Improvement Needed
	STUDENT-CENTERED ACTIONS ←			TEACHER-CENTERED ACTIONS	
LEARNING ENVIRONMENT CLASSROOM CULTURE	ALL	ALL	ALL	MOST	FEW
LEARNING ENVIRONMENT MANAGING STUDENT BEHAVIOR	CONSISTENTLY	CONSISTENTLY	CONSISTENTLY	INCONSISTENTLY	RARELY
INSTRUCTION ACHIEVING EXPECTATIONS	ALL	MOST	MOST	SOME	FEW
INSTRUCTION CONTENT KNOWLEDGE AND EXPERTISE	CONSISTENTLY	REGULARLY	DOES (ACTION)	SOMETIMES	FEW
INSTRUCTION DIFFERENTIATION	ALWAYS	REGULARLY	DOES (ACTION)	SOMETIMES	DOES NOT (ACTION)

# Dimension 3 Calibration

Use descriptors to determine a TTESS level for Dimensions 3.1, 3.2 and 3.3. Script evidence to support your rating.

[DO IT!](#)



# **DOMAIN III – LEARNING ENVIRONMENT DIMENSION 3.3 CLASSROOM CULTURE**

**TEN MINUTES IN BREAKOUT ROOMS TO  
DETERMINE PERFORMANCE LEVEL**

# **DOMAIN III – LEARNING ENVIRONMENT DIMENSION 3.3 CLASSROOM CULTURE**

**Go to [www.menti.com](http://www.menti.com) and use the  
code **93 69 98****

**THE PERSON WITH THE MOST TABS OPEN ON THEIR DESKTOP WILL ENTER YOUR  
BREAKOUT ROOM'S SCORE FOR EACH SUBDIMENSION (3.1, 3.2 AND 3.3) AND BE  
YOUR TEAM'S SPOKEPERSON FOR THE DEBRIEF.**

# DOMAIN IV – MISSION

## WHY

THIS DOMAIN IS EXCLUSIVE TO ILTEXAS. THE DIMENSIONS ARE HOW WE PRACTICE THE PILLARS OF OUR MISSION EVERYDAY THROUGH CHARACTER AND OTHERS BEFORE SELF.

## WHEN

THIS DOMAIN IS TO BE OBSERVED BEYOND THE CONFINES OF THE CLASSROOM AND PERMEATE ILTEXAS.

Who are you when nobody is watching?

# DOMAIN IV – MISSION

## DIMENSION 4.1 LEADERSHIP

<b>MISSION</b>					
<b>Leadership (Dimension 4.1)</b>					
<b>Dimension 4.1:</b>	<b>DISTINGUISHED</b>	<b>ACCOMPLISHED</b>	<b>PROFICIENT</b>	<b>DEVELOPING</b>	<b>IMPROVEMENT NEEDED</b>
<p>The teacher designs clear, well organized, sequential lessons that reflect Service Learning, Servant Leadership &amp; Others Before Self.</p> <p><b>Standards Basis:</b> 2A, 2C, 3A, 3B, 3C, 5C, 6C, 6D</p> <p><b>Potential Sources of Evidence:</b> Conferences and conversations with the teacher; formal observations and walkthroughs; classroom artifacts; analysis of student data</p>	<ul style="list-style-type: none"> <li>● Teacher consistently follows the District Leadership Pacing Guide, YAG, with fidelity.</li> <li>● Teacher consistently uses the District provided curriculum with fidelity.</li> <li>● Teacher is consistently utilizing the District provided lesson format</li> <li>● Teacher consistently utilizes resources provided by the District to implement curriculum, such as assigned text, software platform, leadership journal and assessment with fidelity</li> <li>● Teacher consistently demonstrates knowledge and instructional skills that are aligned with District Mission, Leadership Principles and Traits.</li> <li>● All students complete OBS for Academic Year</li> </ul>	<ul style="list-style-type: none"> <li>● Teacher consistently follows the District Leadership Pacing Guide, YAG..</li> <li>● Teacher consistently uses the District provided curriculum.</li> <li>● Teacher is consistently utilizing the District provided lesson format</li> <li>● Teacher consistently utilizes resources provided by the District to implement curriculum, such as assigned text, software platform, leadership journal and assessment.</li> <li>● Teacher frequently demonstrates knowledge and instructional skills that are aligned with District Mission, Leadership Principles and Traits.</li> <li>● Substantial majority of students complete OBS for Academic Year</li> </ul>	<ul style="list-style-type: none"> <li>● Teacher is following the District Leadership Pacing Guide, YAG.</li> <li>● Evidence teacher is using the District provided curriculum.</li> <li>● Evidence teacher is executing the District provided lesson format.</li> <li>● Evidence teacher is using necessary resources provided by the District to implement curriculum, such as assigned text, software platform, leadership journal and assessment.</li> <li>● Teacher demonstrates knowledge and instructional skills that are aligned with District Mission, Leadership Principles and Traits.</li> <li>● Majority of students complete OBS for Academic Year</li> </ul>	<ul style="list-style-type: none"> <li>● Infrequent evidence teacher is following the District Leadership Pacing Guide, YAG.</li> <li>● Infrequent evidence a teacher is using the District provided curriculum.</li> <li>● Infrequent evidence the teacher is executing the District provided lesson format.</li> <li>● The teacher is using necessary resources infrequently that are provided by the District to implement curriculum, such as assigned text, software platform, leadership journal and assessment.</li> <li>● Teacher, infrequently, demonstrates knowledge and instructional skills that are aligned with District Mission, Leadership Principles and Traits.</li> <li>● Majority of students did not complete OBS for Academic Year</li> </ul>	<ul style="list-style-type: none"> <li>● No Evidence teacher is following the District Leadership Pacing Guide, YAG.</li> <li>● No Evidence teacher is using the District provided curriculum.</li> <li>● No Evidence teacher is executing the District provided lesson format.</li> <li>● No Evidence teacher is using necessary resources provided by the District to implement curriculum, such as assigned text, software platform, leadership journal and assessment.</li> <li>● No Evidence that teacher instruction is aligned with District Mission, Leadership Principles and Traits.</li> <li>● Substantial majority of students did not complete OBS for Academic Year</li> </ul>

# DOMAIN IV – MISSION

## DIMENSION 4.2 LANGUAGE

MISSION					
Language (Dimension 4.2)					
Dimension 4.2	DISTINGUISHED	ACCOMPLISHED	PROFICIENT	DEVELOPING	IMPROVEMENT NEEDED
Standards Basis:	Strong and consistent evidence of ...	Consistent evidence of ...	Evidence of ....	Some evidence ...	No evidence of ....
<p>Potential Sources of Evidence: Trilingual print rich environment (classroom/grade level hallway), use of the target language by teachers and students), Engaging and promoting the following: Expression of the Week, Trilingual Recital, Academic Word of the Week, language clubs, Chinese and Spanish Honor Societies, Intercultural events (HHM, Lunar New Year, Black History Month, EOY Intercultural Festival), Spanish, Chinese and English spelling bees, Chinese multiplication competition, ongoing international immersion trips</p>	<ul style="list-style-type: none"> <li>● <b>Communication</b> - Teachers and students consistently communicate in Spanish, Chinese and English Languages at 90-100% of the time.</li> <li>● <b>Culturally Responsive Teaching</b> -Teachers actively seek to better understand the diverse cultures and languages represented in their classroom.</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Culturally Responsive Teaching</b> -Teachers actively seek to better understand the diverse cultures and languages represented in their classroom.</li> <li>● <b>Intercultural Connections</b>- Helps students develop knowledge, empathy, understanding, and appreciation of other cultures by demonstrating an understanding of the relationship between the perspectives, practices and products of the culture studied and their own.</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Culturally Responsive Teaching</b> -Teachers actively seek to better understand the diverse cultures and languages represented in their classroom.</li> <li>● <b>Intercultural Connections</b>- Helps students develop knowledge, empathy, understanding, and appreciation of other cultures by demonstrating an understanding of the relationship between the perspectives, practices and products of the culture studied and their own.</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Culturally Responsive Teaching</b> -Teachers actively seek to better understand the diverse cultures and languages represented in their classroom.</li> <li>● <b>Intercultural Connections</b>- Helps students develop knowledge, empathy, understanding, and appreciation of other cultures by demonstrating an understanding of the relationship between the perspectives, practices and products of the culture studied and their own.</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Culturally Responsive Teaching</b> -Teachers actively seek to better understand the diverse cultures and languages represented in their classroom.</li> <li>● <b>Intercultural Connections</b>- Helps students develop knowledge, empathy, understanding, and appreciation of other cultures by demonstrating an understanding of the relationship between the perspectives, practices and products of the culture studied and their own.</li> </ul>



# DOMAIN IV – MISSION

## DIMENSION 4.2 LANGUAGE (CONT...)

MISSION					
Language (Dimension 4.2)					
Dimension 4.2	DISTINGUISHED	ACCOMPLISHED	PROFICIENT	DEVELOPING	IMPROVEMENT NEEDED
<p><b>Standards Basis:</b></p> <p><b>Potential Sources of Evidence:</b> Trilingual print rich environment (classroom/grade level hallway), use of the target language by teachers and students), Engaging and promoting the following: Expression of the Week, Trilingual Recital, Academic Word of the Week, language clubs, Chinese and Spanish Honor Societies, Intercultural events (HHM, Lunar New Year, Black History Month, EOY Intercultural Festival), Spanish, Chinese and English spelling bees, Chinese multiplication competition, ongoing international immersion trips</p>	<p>Strong and consistent evidence of ...</p> <ul style="list-style-type: none"> <li>● <b>Life-Long Learning-</b> Teacher fosters life-long learning of the languages through the ILTexas Trilingual Model to help students meet personal and professional goals.</li> <li>● <b>Authentic Learning -</b> Enhances meaning through content study, critical thinking, and relevant connections to their real-world.</li> <li>● <b>Communities -</b> Teachers promotes student participation in multilingual communities at home and around the World</li> <li>● <b>Communication -</b> Teachers and students consistently participate in multilingual communities at home and around the World</li> </ul>	<p>Consistent evidence of ....</p> <ul style="list-style-type: none"> <li>● <b>Life-Long Learning-</b> Teacher fosters life-long learning of the languages through the ILTexas Trilingual Model to help students meet personal and professional goals.</li> <li>● <b>Authentic Learning -</b> Enhances meaning through content study, critical thinking, and relevant connections to their real-world.</li> <li>● <b>Communities -</b> Teachers promotes student participation in multilingual communities at home and around the World</li> <li>● <b>Communication -</b> Teachers and students consistently communicate in Spanish, Chinese and English Languages at 90-100% of the time.</li> </ul>	<p>Evidence of ....</p> <ul style="list-style-type: none"> <li>● <b>Life-Long Learning-</b> Teacher fosters life-long learning of the languages through the ILTexas Trilingual Model to help students meet personal and professional goals.</li> <li>● <b>Authentic Learning -</b> Enhances meaning through content study, critical thinking, and relevant connections to their real-world.</li> <li>● <b>Communities -</b> Teachers promotes student participation in multilingual communities at home and around the World</li> <li>● <b>Communication -</b> Teachers and students consistently communicate in Spanish, Chinese and English Languages at 90-100% of the time.</li> </ul>	<p>Some evidence ...</p> <ul style="list-style-type: none"> <li>● <b>Life-Long Learning-</b> Teacher fosters life-long learning of the languages through the ILTexas Trilingual Model to help students meet personal and professional goals.</li> <li>● <b>Authentic Learning -</b> Enhances meaning through content study, critical thinking, and relevant connections to their real-world.</li> <li>● <b>Communities -</b> Teachers promotes student participation in multilingual communities at home and around the World</li> <li>● <b>Communication -</b> Teachers and students consistently communicate in Spanish, Chinese and English Languages at 90-100% of the time.</li> </ul>	<p>No evidence of ....</p> <ul style="list-style-type: none"> <li>● <b>Life-Long Learning-</b> Teacher fosters life-long learning of the languages through the ILTexas Trilingual Model to help students meet personal and professional goals.</li> <li>● <b>Authentic Learning -</b> Enhances meaning through content study, critical thinking, and relevant connections to their real-world.</li> <li>● <b>Communities -</b> Teachers promotes student participation in multilingual communities at home and around the World</li> <li>● <b>Communication -</b> Teachers and students consistently communicate in Spanish, Chinese and English Languages at 90-100% of the time.</li> </ul>

# DOMAIN IV – MISSION

## DIMENSION 4.3 PERFORMANCE TRAINING

MISSION Performance Training (Dimension 4.3)					
Dimension 4.3	DISTINGUISHED	ACCOMPLISHED	PROFICIENT	DEVELOPING	IMPROVEMENT NEEDED
<p><b>Standards Basis:</b></p> <p><b>Potential Sources of</b></p>	<ul style="list-style-type: none"> <li>• Mission is posted and recited in a class periods, alternating languages</li> <li>• Displays high energy knowledge of all the All Levels he or she teaches</li> <li>• Integrates three languages of English, Spanish and Chinese daily in each class.</li> <li>• Consistently monitors each student looking for opportunities to improve learning experience .</li> <li>• Consistently provides opportunities for students to use what they have learned to teach peers..</li> <li>• Sequences instruction that allows students to understand how the lesson fits within the structure of the state standards,</li> </ul>	<ul style="list-style-type: none"> <li>• Mission is posted and referred to during classes</li> <li>• Establishes classroom routines that encourage all students to participate safely and effectively using a variety of methods. .</li> <li>• Provides one on one teachable moments to ensure a level of the content is being Mastered. .</li> <li>• Balances time management, to assist all students. Through verbal dialogue. To improve students' knowledge of health and fitness.</li> </ul>	<ul style="list-style-type: none"> <li>• Mission is posted in the gym and recited</li> <li>• All protocols, and classroom procedures are communicated clearly and efficiently (in 3 languages)</li> <li>• Students actively participate in warmup/ bell ringer , activity and classroom resources are aligned and prepared for instruction.</li> </ul>	<ul style="list-style-type: none"> <li>• Mission is referred to during class</li> <li>• sometimes modifies instruction and lesson plan to make class less rigor</li> <li>• Often misses opportunities to correct students</li> <li>• Recognizes student behavior but does not engage in corrective behavior.</li> </ul>	<p>All Teachers:</p> <ul style="list-style-type: none"> <li>• Mission should be posted and recited consistently</li> </ul> <p>Fitness Coaches:</p> <ul style="list-style-type: none"> <li>• Rarely is prepared with energy to start class</li> <li>• 100% Students not actively engaged in lessons.</li> <li>•</li> </ul>

# DOMAIN IV – MISSION

## DIMENSION 4.4 INTERNATIONAL COMMUNITY

MISSION					
International Community (Dimension 4.4)					
Dimension 4.4	DISTINGUISHED	ACCOMPLISHED	PROFICIENT	DEVELOPING	IMPROVEMENT NEEDED
<p>The teacher demonstrates understanding of different cultural perspectives and worldviews as members of an international community.</p> <p><b>Standards Basis:</b> 1A, 1C, 1E, 2B, 3C, 4A</p> <p><b>Evidence:</b> Cross cultural activities (If applicable) Conferences and conversations with the teacher; formal observations and walkthroughs; classroom artifacts; data</p>	<ul style="list-style-type: none"> <li>● Always ties in different cultural perspectives to the subject and presented in a manner that is relevant to the student</li> <li>● Always provides intellectual and emotional dimensions of more than one worldview and sometimes uses more than one worldview in interactions with students</li> <li>● Always asks questions about other cultures and seeks out answers to these questions</li> <li>● Always demonstrates understanding of the complexity of elements important to members of another culture in relation to its history, values, politics, communication styles, economy, or beliefs and practices</li> </ul>	<ul style="list-style-type: none"> <li>● Regularly ties in different cultural perspectives to the subject and presented in a manner that is relevant to the student</li> <li>● Regularly provides intellectual and emotional dimensions of more than one worldview and sometimes uses more than one worldview in interactions with students</li> <li>● Regularly asks questions about other cultures and seeks out answers to these questions</li> <li>● Regularly demonstrates understanding of the complexity of elements important to members of another culture in relation to its history, values, politics, communication styles, economy, or beliefs and practices</li> </ul>	<ul style="list-style-type: none"> <li>● Ties in different cultural perspectives to the subject and presented in a manner that is relevant to the student</li> <li>● Provides intellectual and emotional dimensions of more than one worldview and sometimes uses more than one worldview in interactions with students</li> <li>● Asks questions about other cultures and seeks out answers to these questions</li> <li>● Demonstrates understanding of the complexity of elements important to members of another culture in relation to its history, values, politics, communication styles, economy, or beliefs and practices</li> </ul>	<ul style="list-style-type: none"> <li>● Sometimes ties in different cultural perspectives to the subject and presented in a manner that is relevant to the student</li> <li>● Sometimes provides intellectual and emotional dimensions of more than one worldview and sometimes uses more than one worldview in interactions with students</li> <li>● Sometimes asks questions about other cultures and seeks out answers to these questions</li> <li>● Sometimes demonstrates understanding of the complexity of elements important to members of another culture in relation to its history, values, politics, communication styles, economy, or beliefs and practices</li> </ul>	<ul style="list-style-type: none"> <li>● Rarely ties in different cultural perspectives to the subject and presented in a manner that is relevant to the student</li> <li>● Rarely provides intellectual and emotional dimensions of more than one worldview and sometimes uses more than one worldview in interactions with students</li> <li>● Rarely asks questions about other cultures and seeks out answers to these questions</li> <li>● Rarely demonstrates understanding of the complexity of elements important to members of another culture in relation to its history, values, politics, communication styles, economy, or beliefs and practices</li> </ul>

# DOMAIN IV – MISSION

## INSTRUCTIONS FOR BREAKOUT ROOMS

YOU WILL BE BROKEN UP INTO RANDOM GROUPS TO DISCUSS THE DIMENSIONS OF THIS DOMAIN AND REPORT BACK IN 30 MINUTES.

- 1) DECIDE WHO WILL REPORT OUT (SPOKESMAN)
- 2) HOW DO THE DESCRIPTORS INCLUDE THE MISSION OF ILTEXAS AND ARE THERE ANY DESCRIPTORS THAT NEED POLISHING?
- 3) WHEN ARE THE OPPORTUNITIES TO EVALUATE OUR TEACHERS? WHAT WILL BE THE PROOF THAT THEY ARE ACHIEVING A PERFORMANCE LEVEL?

**2020-2021**



**ILTexas-TESS = A resource for  
your 20-21 Backpack to help aid  
in our collective continuous  
improvement journey!**

# Cover Sheet

## CHIEF ADMINISTRATIVE OFFICER REPORT

**Section:** V. Superintendent-CEO Report and Information Items  
**Item:** D. CHIEF ADMINISTRATIVE OFFICER REPORT  
**Purpose:** FYI  
**Submitted by:**  
**Related Material:** Authorized Board Notification 9.16.2020.pdf  
Authorized Board Report 9.16.2020 (1).pdf



INTERNATIONAL LEADERSHIP OF TEXAS

**Faculty and Support Staff New Hires  
Subsequent to August 19, 2020  
For Board Notification on September 16, 2020**

<b>NEW HIRES FOR THE 20/21 SCHOOL YEAR</b>			
<b>Position</b>	<b>Assignment</b>	<b>Building</b>	<b>Start Date</b>
PARA - DISTRICT	HR STAFFING SPECIALIST	HEADQUARTERS	09/10/2020
PARA - CAMPUS	INSTRUCTIONAL AIDE	LANCASTER ELEMENTARY	08/20/2020
TEACHER	PFC	LANCASTER ELEMENTARY	08/31/2020
TEACHER	MIDDLE	COLLEGE STATION MIDDLE	08/25/2020
TEACHER	ELEMENTARY	COLLEGE STATION ELEMENTARY	09/03/2020
PROF - CAMPUS	INSTRUCTIONAL COACH	WEST PARK ELEMENTARY	09/08/2020
PROF - DISTRICT	EXECUTIVE DIRECTOR	HEADQUARTERS	09/02/2020
TEACHER	MIDDLE	SAGINAW MIDDLE	08/24/2020
TEACHER	ELEMENTARY	GARLAND ELEMENTARY	08/21/2020
TEACHER	MIDDLE	COLLEGE STATION MIDDLE	09/02/2020
TEACHER	MIDDLE	EAST FW MIDDLE	09/01/2020
TEACHER	ELEMENTARY	NRH ELEMENTARY	08/31/2020
LIBRARIAN	LIBRARIAN	HEADQUARTERS	09/02/2020
TEACHER	ELEMENTARY	HEADQUARTERS	09/09/2020
TEACHER	ELEMENTARY	SAGINAW ELEMENTARY	08/28/2020
TEACHER	ELEMENTARY	ARLINGTON ELEMENTARY	09/15/2020
TEACHER	HIGH	KELLER HIGH	09/14/2020
TEACHER	ELEMENTARY	GARLAND ELEMENTARY	09/01/2020
PARA - DISTRICT	POSITION CONTROL SPECIALIST	HEADQUARTERS	09/10/2020
PROF - DISTRICT	STUDENT RECRUITER	ARLINGTON AREA OFFICE	09/02/2020
PARA - DISTRICT	ADMIN ASSISTANT	HEADQUARTERS	08/31/2020
PARA - CAMPUS	INSTRUCTIONAL AIDE	OREM ELEMENTARY	09/02/2020
COUNSELOR	COUNSELOR	WINDMILL LAKES ELEMENTARY	09/08/2020
PARA - CAMPUS	CAMPUS TECHNICIAN	KELLER ELEMENTARY	08/31/2020
TEACHER	MIDDLE	COLLEGE STATION MIDDLE	09/10/2020
PARA - DISTRICT	HR STAFFING SPECIALIST	HEADQUARTERS	09/10/2020
TEACHER	ELEMENTARY	WEST PARK ELEMENTARY	08/24/2020
TEACHER	HIGH	WINDMILL LAKES HIGH	09/08/2020
TEACHER	MIDDLE	SAGINAW MIDDLE	09/02/2020
PARA - CAMPUS	INSTRUCTIONAL AIDE	COLLEGE STATION ELEMENTARY	08/31/2020
TEACHER	MIDDLE	LANCASTER MIDDLE	08/20/2020
PARA - CAMPUS	INSTRUCTIONAL AIDE	WINDMILL LAKES ELEMENTARY	08/21/2020
TEACHER	HIGH	ARLINGTON HIGH	08/20/2020
PARA - CAMPUS	CAMPUS TECHNICIAN	GARLAND HIGH	09/02/2020
TEACHER	ELEMENTARY	EAST FW ELEMENTARY	09/02/2020
TEACHER	MIDDLE	SAGINAW MIDDLE	08/27/2020
TEACHER	PFC	KATY/WESTPARK HIGH	09/04/2020
PARA - CAMPUS	RECEPTIONIST	GARLAND ELEMENTARY	09/08/2020
PARA - CAMPUS	INSTRUCTIONAL AIDE	EAST FW ELEMENTARY	09/14/2020
TEACHER	MIDDLE	ARLINGTON MIDDLE	08/25/2020
TEACHER	ELEMENTARY	OREM ELEMENTARY	08/24/2020
PARA - CAMPUS	INSTRUCTIONAL AIDE	GRAND PRAIRIE ELEMENTARY	09/08/2020
PARA - CAMPUS	INSTRUCTIONAL AIDE	WINDMILL LAKES HIGH	09/09/2020
COUNSELOR	COUNSELOR	HEADQUARTERS	08/25/2020
PARA - CAMPUS	INSTRUCTIONAL AIDE	KELLER HIGH	09/08/2020
TEACHER	ELEMENTARY	HEADQUARTERS	09/01/2020
TEACHER	ELEMENTARY	ARLINGTON ELEMENTARY	08/21/2020
TEACHER	ELEMENTARY	EAST FW ELEMENTARY	08/25/2020
PARA - CAMPUS	INSTRUCTIONAL AIDE	SAGINAW ELEMENTARY	09/08/2020
TEACHER	HIGH	WINDMILL LAKES HIGH	09/08/2020
TEACHER	ELEMENTARY	WEST PARK ELEMENTARY	08/26/2020
TEACHER	HIGH	GARLAND HIGH	08/24/2020
TEACHER	MIDDLE	GARLAND MIDDLE	09/08/2020
TEACHER	MIDDLE	GARLAND MIDDLE	09/14/2020
TEACHER	HIGH	KATY/WESTPARK HIGH	08/31/2020
TEACHER	ELEMENTARY	EAST FW ELEMENTARY	08/24/2020
TEACHER	ELEMENTARY	LANCASTER ELEMENTARY	09/08/2020



INTERNATIONAL LEADERSHIP OF TEXAS

PARA - DISTRICT	HR STAFFING SPECIALIST	HEADQUARTERS	09/10/2020
PROF - CAMPUS	INSTRUCTIONAL COACH	GRAND PRAIRIE ELEMENTARY	08/26/2020
TEACHER	ELEMENTARY	HEADQUARTERS	08/31/2020
TEACHER	ELEMENTARY	COLLEGE STATION ELEMENTARY	08/24/2020
PARA - CAMPUS	INSTRUCTIONAL AIDE	WINDMILL LAKES ELEMENTARY	08/31/2020
COUNSELOR	COUNSELOR	ARLINGTON ELEMENTARY	09/09/2020
TEACHER	HIGH	KELLER HIGH	09/11/2020

**Total employees hired subsequent to 08/19/2020: 64**

**Total Employee Count for 20/21 SY: 2,082**

**All employees are contingent upon Fingerprint and HR Clearance.**





INTERNATIONAL LEADERSHIP OF TEXAS

**Authorized Position Report  
September 16, 2020**

**20/21 SCHOOL YEAR**

<b>Position</b>	<b># Positions</b>	<b>Positions Filled</b>	<b>Available FTE</b>	<b>Pending</b>	<b>Unfilled</b>
AUX - FOOD SERVICE	14.00	13.00	1.00		1
AUX - MAINTENANCE	37.00	33.00	4.00	3	1
AUX - TRANSPORTATION	31.50	20.50	11.00		11
COUNSELOR	51.00	51.00	-		-
LIBRARIAN/MEDIA	19.00	19.00	-		-
NURSE	16.00	16.00	-		-
PARA - CAMPUS	368.00	336.00	32.00	8	24
PARA - DISTRICT	55.00	50.00	5.00		5
PROF - CAMPUS	46.00	41.50	4.50	1	3.5
PROF - CAMPUS ADMIN	73.00	71.00	2.00	-	2
PROF - DISTRICT	158.00	148.00	10.00	6	4
SLP	13.00	11.00	2.00	-	2
SUPERINTENDENT	1.00	1.00	-		-
TEACHER	1,346.50	1,271.50	75.00	43	32
<b>Total</b>	<b>2,229.00</b>	<b>2,082.50</b>	<b>146.5</b>	<b>61</b>	<b>85.5</b>

# Cover Sheet

## VOTE ON CONSENT AGENDA ITEMS

**Section:** VI. Consent Agenda  
**Item:** A. VOTE ON CONSENT AGENDA ITEMS  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 9-16-20 Consent Agenda Exhibits combined.pdf

CONSENT AGENDA ITEM 1  
Revised Title IX Policy

**INTERNATIONAL LEADERSHIP OF TEXAS**  
**BOARD POLICY MANUAL**  
**POLICY GROUP 3 – STUDENTS**  
**PROHIBITED DISCRIMINATION, RETALIATION,**  
**AND HARASSMENT**

PG-3.2

**Sec. 1. NONDISCRIMINATION STATEMENT**

ILTexas prohibits discrimination, including harassment, against any student on the basis of race, color, religion, sex, gender, national origin, disability, age, or any other basis prohibited by law. ILTexas further prohibits retaliation against anyone involved in the complaint process.

**Sec. 2. GENERAL NON-DISCRIMINATION POLICY**

**a) *Prohibited Conduct***

In this policy, the term “prohibited conduct” includes discrimination, harassment, and/or retaliation as defined by this policy, even if the behavior does not rise to the level of unlawful conduct.

**i. Prohibited Discrimination**

Discrimination against a student is defined as conduct directed at a student on the basis of race, color, religion, sex, gender, national origin, disability, age, or on any other basis prohibited by law, that adversely affects the student.

**ii. Prohibited Harassment**

Prohibited harassment of a student is defined as physical, verbal, or nonverbal conduct based on the student’s race, color, religion, sex, gender, national origin, disability, age, or any other basis prohibited by law that is so severe, persistent, or pervasive that the conduct:

1. Affects a student’s ability to participate in or benefit from an educational program or activity, or creates an intimidating, threatening, hostile, or offensive educational environment;
2. Has the purpose or effect of substantially or unreasonably interfering with the student’s academic performance; or
3. Otherwise adversely affects the student’s educational opportunities.

Examples of prohibited harassment may include offensive or derogatory language directed at another person’s religious beliefs or practices, accent, skin color, or need for accommodation; threatening or intimidating conduct; offensive jokes; name calling, slurs, or rumors; physical aggression or assault; display of graffiti or printed material promoting racial, ethnic, or other negative stereotypes; or other kinds of aggressive conduct such as theft or damage to property.

**iii. Prohibited Gender-Based Harassment**

Gender-based harassment includes physical, verbal, or nonverbal conduct based on a student’s gender, the student’s expression of characteristics perceived as stereotypical for the student’s

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gender, or the student’s failure to conform to stereotypical notions of femininity or masculinity. Gender-based harassment is considered prohibited harassment if the conduct is so severe, persistent, or pervasive that it:

1. Affects a student’s ability to participate in or benefit from an educational program or activity, or creates an intimidating, threatening, hostile, or offensive educational environment;
2. Has the purpose or effect of substantially or unreasonably interfering with the student’s academic performance; or
3. Otherwise adversely affects the student’s educational opportunities.

Examples of gender-based harassment, regardless of the student’s or alleged harasser’s actual or perceived gender, may include offensive jokes, name-calling, slurs, or rumors; physical aggression or assault; threatening or intimidating conduct; or other kinds of aggressive conduct such as theft or damage to property.

iv. *Prohibited Retaliation*

ILTexas prohibits retaliation against a student alleged to have experienced discrimination or harassment or another student who, in good faith, makes a report, serves as a witness, or otherwise participates in an investigation.

Examples of retaliation may include threats, rumor spreading, ostracism, assault, destruction of property, unjustified punishments, or unwarranted grade reductions. Unlawful retaliation does not include petty slights or annoyances.

**b) *False Claims***

A student who intentionally makes a false claim, offers false statements, or refuses to cooperate with a ILTexas investigation regarding discrimination or harassment is subject to appropriate discipline.

**c) *Reporting Procedures (Non-Sexual Harassment)***

Any student who believes that he or she has experienced prohibited conduct or believes that another student has experienced prohibited conduct should immediately report the alleged acts to a teacher, counselor, Principal, or the appropriate Compliance Coordinator designated by ILTexas.

Any ILTexas employee who suspects or receives notice that a student or group of students has or may have experienced prohibited conduct shall immediately notify the appropriate Compliance Coordinator listed in this policy, and take any other steps required by this policy.

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The procedures in this Section 2 will apply to all allegations of prohibited conduct other than allegations of harassment prohibited by Title IX. For allegations of sex-based harassment that, if proved, would meet the definition of sexual harassment under Title IX (including sexual harassment), see the procedures below at Section 3, Sexual Harassment Prohibited – Title IX Policy.

**d) *Definition of Compliance Coordinator***

For the purposes of this policy, Compliance Coordinators are the Title IX Coordinator, the ADA/Section 504 coordinator, and the Superintendent or designee.

v. *Title IX Coordinator*

The Title IX Coordinator is responsible for coordinating ILTexas efforts to comply with its responsibilities under Title IX with respect to discrimination based on sex, including sexual harassment. ILTexas has designated as the following individual as the Title IX Coordinator: Victor Cathey, Executive Director of Athletics and Fitness, 1820 N. Glenville Dr. Suite 100, Richardson, TX 75081. 972-479-9078. [vcathey@iltehas.org](mailto:vcathey@iltehas.org)

vi. *ADA/Section 504 Coordinator*

Reports of discrimination based on disability may be directed to the ADA/Section 504 Coordinator. ILTexas designates the following person to coordinate its efforts to comply with Title II of the Americans with Disabilities Act of 1990, as amended, which incorporates and expands upon the requirements of Section 504 of the Rehabilitation Act of 1973, as amended: Regina Jones, Chief Equity Officer, 1820 N. Glenville Dr. Suite 100, Richardson, TX 75081. 972-479-9078. [Rjones@iltehas.org](mailto:Rjones@iltehas.org)

vii. *Coordinator for Purposes of Compliance with Other Nondiscrimination Laws*

The following person(s) have been designated to coordinate ILTexas compliance with all other antidiscrimination laws; Regina Jones, Chief Equity Officer, 1820 N. Glenville Dr. Suite 100, Richardson, TX 75081. 972-479-9078. [rjones@iltehas.org](mailto:rjones@iltehas.org)

**e) *Alternate Reporting Procedures***

A student shall not be required to report prohibited conduct to the person alleged to have committed the conduct. Reports concerning prohibited conduct, including reports against the Title IX Coordinator or ADA/Section 504 Coordinator, may be directed to the Superintendent or designee. Reports concerning prohibited conduct by the Superintendent or designee may be made directly to the Board. If a report is made directly to the Board, the Board shall appoint an appropriate person to conduct an investigation.

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**f) *Timely Reporting***

Reports of prohibited conduct shall be made as soon as possible after the alleged act or knowledge of the alleged act. A failure to promptly report may impair ILTexas ability to investigate and address the prohibited conduct.

**g) *Notice to Parents***

A ILTexas official or designee shall promptly notify the parents of any student alleged to have experienced prohibited conduct by a ILTexas employee or another adult.

**h) *Investigation***

ILTexas may request, but shall not insist upon, a written report. If a report is made orally, the school official shall reduce the report to written form.

Upon receipt or notice of a report, the appropriate Compliance Coordinator shall determine whether the allegations, if proven, would constitute prohibited conduct as defined by this policy. If so, the Compliance Coordinator shall immediately authorize or undertake an investigation, regardless of whether a criminal or regulatory investigation regarding the same or similar allegations is pending.

If appropriate, ILTexas shall promptly take interim action calculated to prevent prohibited conduct during the course of an investigation.

The investigation may be conducted by a Compliance Coordinator or designee, or by a third party designated by ILTexas, such as an attorney. When appropriate, the Principal shall be involved in or informed of the investigation.

The investigation may consist of personal interviews with the person making the report, the person against whom the report is filed, and others with knowledge of the circumstances surrounding the allegations. The investigation may also include analysis of other information or documents related to the allegations.

**i) *Concluding the Investigation***

Absent extenuating circumstances, the investigation should be completed within ten school business days from the date of the report. If the investigator determines that additional time is needed to complete a thorough investigation of the complaint and/or issue a report, he or she shall inform the complainant in writing of the necessity to extend the time for investigating or responding and a specific date by which the report will be issued.

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The investigator shall prepare a written report of the investigation. The report shall be filed with the Compliance Coordinator overseeing the investigation.

**j) *School Action***

If the results of an investigation indicate that prohibited conduct occurred, ILTexas shall promptly respond by taking appropriate disciplinary or corrective action reasonably calculated to address the conduct.

ILTexas may take action based on the results of an investigation, even if the conduct did not rise to the level of prohibited or unlawful conduct.

**k) *Confidentiality***

To the greatest extent possible, ILTexas shall respect the privacy of the complainant, persons against whom a report is filed, and witnesses. Limited disclosures may be necessary in order to conduct a thorough investigation and comply with applicable law.

**l) *Appeal***

A student who is dissatisfied with the outcome of the investigation may appeal through Board Policy PG-3.XX (Parent and Student Complaints and Grievances), beginning at the appropriate level. A student shall be informed of his or her right to file a complaint with the United States Department of Education Office for Civil Rights.

**m) *Records Retention***

Retention of records shall be in accordance with the applicable schedule published by the Texas State Library and Archives Commission.

**Sec. 3. SEXUAL HARASSMENT PROHIBITED – TITLE IX POLICY**

**a) *Definitions for Title IX Terms***

**i. Actual Knowledge**

“Actual knowledge” means notice of sexual harassment or allegations of sexual harassment to ILTexas Title IX Coordinator or any ILTexas official who has authority to institute corrective measures on behalf of ILTexas, or to any employee of an elementary and secondary school. Imputation of knowledge based solely on vicarious liability or constructive notice is insufficient to constitute actual knowledge. This standard is not met when the only official of ILTexas with actual knowledge is the respondent (as that term is defined below). The mere ability or obligation to report sexual harassment or to inform a student about how to report sexual harassment, or having

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been trained to do so, does not qualify an individual as one who has authority to institute corrective measures on behalf of ILTexas. “Notice” as used in this definition includes, but is not limited to, a report of sexual harassment to the Title IX Coordinator. *34 C.F.R. 106.30(a)*.

ii. Complainant

“Complainant” means an individual who is alleged to be the victim of conduct that could constitute sexual harassment. *34 C.F.R. 106.30(a)*.

iii. Consent

“Consent” is not currently defined by the Title IX regulations, nor do the regulations require ILTexas to adopt a particular definition of consent with respect to sexual assault. *34 C.F.R. 106.30(a)*.

iv. Deliberate Indifference Standard

If ILTexas has actual knowledge of sexual harassment in an education program or activity of ILTexas against a person in the United States, it must respond promptly in a manner that is not deliberately indifferent. ILTexas is deliberately indifferent only if its response to sexual harassment is clearly unreasonable in light of the known circumstances. *34 C.F.R. 106.44*.

v. Education Program or Activity

For purposes of this Title IX policy, “education program or activity” includes locations, events, or circumstances over which ILTexas exercised substantial control over both the respondent and the context in which sexual harassment occurs. *34 C.F.R. 106.44*.

vi. Formal Complaint

“Formal complaint” means a document filed by a complainant or signed by the Title IX Coordinator alleging sexual harassment against a respondent and requesting that ILTexas investigate the allegation of sexual harassment. At the time of filing a formal complaint, a complainant must be participating in or attempting to participate in ILTexas education program or activity. A formal complaint may be filed with the Title IX Coordinator in person, by mail, or by email, by using the contact information for the Title IX Coordinator provided by ILTexas, and by any additional method designated by ILTexas. As used in this definition, the term “document filed by a complainant” means a document or electronic submission (such as by email or through an online portal provided for this purpose by ILTexas) that contains the complainant’s physical or digital signature, or otherwise indicates that the complainant is the person filing the formal complaint. Where the Title IX Coordinator signs a formal complaint, the Title IX Coordinator is not a complainant or otherwise a party to the Title IX formal complaint, and must comply with the

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requirements of the Title IX formal process, including the informal resolution process. *34 C.F.R. 106.30(a)*.

vii. Respondent

“Respondent” means an individual who has been reported to be the perpetrator of conduct that could constitute sexual harassment. *34 C.F.R. 106.30(a)*.

viii. Sexual Harassment

“Sexual harassment” means conduct on the basis of sex that satisfies one or more of the following:

1. An employee of ILTexas conditioning the provision of an aid, benefit, or service of ILTexas on an individual’s participation in unwelcome sexual conduct;
2. Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to ILTexas education program or activity; or
3. “Sexual assault” as defined in [20 U.S.C. 1091\(f\)\(6\)\(A\)\(v\)](#); “dating violence” as defined in [34 U.S.C. 12291\(a\)\(10\)](#); “domestic violence” as defined in [34 U.S.C. 12291\(a\)\(8\)](#); or “stalking” as defined in [34 U.S.C. 12291\(a\)\(30\)](#).

*34 C.F.R. 106.30(a)*.

ix. Supportive Measures

“Supportive measures” means nondisciplinary, nonpunitive individualized services offered as appropriate, as reasonably available, and without fee or charge to the complainant or the respondent before or after the filing of a formal complaint or where no formal complaint has been filed. Such measures are designed to restore or preserve equal access to ILTexas education program or activity without unreasonably burdening the other party, including measures designed to protect the safety of all parties or ILTexas educational environment, or deter sexual harassment. Supportive measures may include counseling, extensions of deadlines or other course-related adjustments, modifications of work or class schedules, campus escort services, mutual restrictions on contact between the parties, changes in work, leaves of absence, increased security and monitoring of certain areas of the campus, and other similar measures. ILTexas must maintain as confidential any supportive measures provided to the complainant or respondent, to the extent that maintaining such confidentiality would not impair ILTexas ability to provide the supportive measures. The Title IX Coordinator is responsible for coordinating the effective implementation of supportive measures. *34 C.F.R. 106.30(a)*.

**b) Requirement to Designate Title IX Coordinator**

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ILTexas must designate at least one employee as a Title IX Coordinator to coordinate ILTexas efforts to comply with its requirements under Title IX.

**c) *Notification of Title IX Policy***

ILTexas must notify applicants for admission and employment, students, parents or legal guardians of students, and all professional organizations holding professional agreements with ILTexas of the name or title, office address, email address, and telephone number of the employee or employees designated as the Title IX Coordinator.

ILTexas must also notify the individuals noted above that ILTexas does not discriminate on the basis of sex in the education program or activity that it operates, and that it is required under Title IX not to discriminate in such a manner. The notification must also state that the requirement not to discriminate in the education program or activity extends to admission and employment, and that inquiries about the application of Title IX to ILTexas may be referred to the designated Title IX Coordinator, to the assistant secretary for civil rights of the Department of Education, or both.

*34 C.F.R. 106.8(a), (b)(1).*

**d) *Handbook Information and Website Postings***

ILTexas must prominently display the contact information required to be listed for the Title IX Coordinator and the nondiscrimination policy described in “Notification of Title IX Policy,” above, on the ILTexas website, if any, and in the Employee Handbook and Student / Parent Handbook.

ILTexas may not use or distribute a publication stating that ILTexas treats applicants, students, or employees differently on the basis of sex except when such treatment is permitted by Title IX.

*34 C.F.R. 106.8(b)(2).*

**e) *Reporting Sex Discrimination / Sexual Harassment***

Any person may report sex discrimination, including sexual harassment, whether or not the reporting person is the person alleged to be the victim of conduct that may constitute sex discrimination or sexual harassment. Reports may be made in person, by mail, by telephone, or by email through the contact information listed for ILTexas Title IX Coordinator, or by any other means that results in the Title IX Coordinator receiving the person’s verbal or written report. Reports may be made at any time (including during nonbusiness hours) by using the telephone number or email address, or by mail to the office address, listed for the Title IX Coordinator. *34 C.F.R. 106.8(a).*

**f) *Complaint Procedures***

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ILTexas must adopt and publish procedures that provide for the prompt and equitable resolution of student and employee complaints alleging any action that would be prohibited by Title IX, and a formal Title IX complaint process that complies with applicable federal regulations.

ILTexas must provide notice to the individuals identified in Sec. 3(b) above of the school’s procedures and Title IX formal complaint process, including how to report or file a complaint of sex discrimination, how to report or file a formal complaint of sexual harassment, and how ILTexas will respond.

The requirements of this provision apply only to sex discrimination occurring against a person in the United States.

*34 C.F.R. 106.8(c)-(d).*

**g) *Response by Title IX Coordinator***

The Title IX Coordinator must promptly contact the complainant to discuss the availability of supportive measures, consider the complainant’s wishes with respect to supportive measures, , inform the complainant of the availability of supportive measures with or without the filing of a formal complaint, and explain to the complainant the process for filing a formal complaint.

i. *Required Supportive Measures*

ILTexas response must treat complainants and respondents equitably by offering supportive measures and by following a grievance process that complies with the Title IX regulations (*see* Process for Formal Title IX Complaint, Sec. 3(h) below) before the imposition of any disciplinary sanctions or other actions that are not supportive measures against a respondent.

*34 C.F.R. 106.44(a).*

ii. *Response to Formal Complaint*

In response to a formal complaint, ILTexas must follow a process that complies with the Title IX regulations (*see* Process for Formal Title IX Complaint, Sec. 3(h) below).

*34 C.F.R. 106.44(b)(1).*

iii. *Emergency Removals*

ILTexas is not precluded from removing a respondent from its education program or activity on an emergency basis, provided that ILTexas:

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1. Undertakes an individualized safety and risk analysis;
2. Determines that an immediate threat to the physical health or safety of any student or other individual arising from the allegations of sexual harassment justifies removal; and
3. Provides the respondent with notice and an opportunity to challenge the decision immediately following the removal.

This may not be construed to modify any rights under the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, or the Americans with Disabilities Act.

*34 C.F.R. 106.44(c).*

iv. *Administrative Leave*

ILTexas is not prohibited from placing a nonstudent employee respondent on administrative leave during the pendency of a Title IX formal complaint. This does not modify any rights under Section 504 of the Rehabilitation Act of 1973 or the Americans with Disabilities Act. *34 C.F.R. 106.44(d).*

**h) *Process for Title IX Formal Complaint***

For purposes of addressing formal complaints of sexual harassment, ILTexas process must comply with the requirements listed in this section. Any provisions, rules, or practices other than those required by the Title IX regulations or this policy that ILTexas adopts as part of its process for handling formal complaints of sexual harassment must apply equally to both parties. *34 C.F.R. 106.45(b).*

ILTexas Title IX formal complaint process must:

1. Treat complainants and respondents equally by providing remedies to a complainant where a determination of responsibility for sexual harassment has been made against the respondent, and by following a process that complies with the Title IX regulations before the imposition of any disciplinary sanctions or other actions that are not supportive measures against a respondent. Remedies must be designed to restore or preserve equal access to ILTexas education program or activity. Such remedies may include the same individualized services described as supportive measures; however, remedies need not be nondisciplinary or nonpunitive and need not avoid burdening the respondent.
2. Require an objective evaluation of all relevant evidence—including both inculpatory and exculpatory evidence—and provide that credibility determinations may not be based on a person’s status as a complainant, respondent, or witness.
3. Require that any individual designated by ILTexas as a Title IX Coordinator, investigator, decision-maker, or any person designated by ILTexas to facilitate an informal resolution process, not to have a conflict of interest or bias for or against

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- complainants or respondents generally or an individual complainant or respondent. ILTexas must ensure that Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process receive training on the definition of sexual harassment, the scope of ILTexas education program or activity, how to conduct an investigation and Title IX formal complaint process (including hearings, appeals, and informal resolution processes, as applicable), and how to serve impartially, including by avoiding prejudgment of the facts at issue, conflicts of interest, and bias. ILTexas must ensure that decision-makers receive training on any technology to be used at a live hearing, if any, and on issues of relevance of questions and evidence, including when questions and evidence about the complainant’s sexual predisposition or prior sexual behavior are not relevant. ILTexas must also ensure that investigators receive training on relevance to create an investigative report that fairly summarizes relevant evidence. Any materials used to train Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process must not rely on sex stereotypes and must promote impartial investigations and adjudications of formal complaints of sexual harassment.
4. Include a presumption that the respondent is not responsible for the alleged conduct until a determination regarding responsibility is made at the conclusion of the Title IX formal complaint process.
  5. Include reasonably prompt timeframes for concluding the grievance process, including reasonably prompt timeframes for filing and resolving appeals and informal resolution processes if ILTexas offers informal resolution processes, and a process that allows for the temporary delay of the Title IX formal complaint process or the limited extension of time frames for good cause with written notice to the complainant and the respondent of the delay or extension and the reasons for the action. Good cause may include considerations such as the absence of a party, a party’s advisor, or a witness; concurrent law enforcement activity; or the need for language assistance or accommodation of disabilities.
  6. Describe the range of possible disciplinary sanctions and remedies or list the possible disciplinary sanctions and remedies that ILTexas may implement following any determination of responsibility.
  7. State whether the standard of evidence to be used to determine responsibility is the preponderance of the evidence standard or the clear and convincing evidence standard, apply the same standard of evidence for formal complaints against students as for formal complaints against employees, including faculty, and apply the same standard of evidence to all formal complaints of sexual harassment.
  8. Include the procedures and permissible bases for the complainant and respondent to appeal.
  9. Describe the range of supportive measures available to complainants and respondents.
  10. Not require, allow, rely upon, or otherwise use questions or evidence that constitute, or seek disclosure of, information protected under a legally-recognized privilege, unless the person holding such privilege has waived the privilege.

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34 C.F.R. 106.45(b)(1).

i. Notice of Allegations

Upon receipt of a formal complaint, ILTexas must provide the following written notice to the parties who are known:

1. Notice of ILTexas Title IX formal complaint process, including any informal resolution process.
2. Notice of the allegations of sexual harassment potentially constituting sexual harassment, including sufficient details known at the time and with sufficient time to prepare a response before any initial interview. Sufficient details include:
  - a. The identities of the parties involved in the incident, if known;
  - b. The conduct allegedly constituting sexual harassment; and
  - c. The date and location of the alleged incident, if known.

The written notice must include a statement that the respondent is presumed not responsible for the alleged conduct and that a determination regarding responsibility is made at the conclusion of the Title IX formal complaint process. The written notice must inform the parties that they may have an advisor of their choice, who may be, but is not required to be, an attorney and may inspect and review evidence. The written notice must inform the parties of any provision in ILTexas Code of Conduct that prohibits knowingly making false statements or knowingly submitting false information during the Title IX formal complaint process.

If, in the course of an investigation, ILTexas decides to investigate allegations about the complainant or respondent that are not included in the notice of allegations, ILTexas must provide notice of the additional allegations to the parties whose identities are known.

34 C.F.R. 106.45(b)(2).

ii. Dismissal of Formal Complaint

ILTexas must investigate the allegations in a formal complaint. If the conduct alleged in the formal complaint would not constitute sexual harassment even if proved, did not occur in ILTexas education program or activity, or did not occur against a person in the United States, then ILTexas must dismiss the formal complaint with regard to that conduct for purposes of sexual harassment under Title IX; such a dismissal does not preclude action under another provision of ILTexas Code of Conduct.

ILTexas may dismiss the formal complaint or any allegations therein if, at any time during the investigation or hearing (if applicable):

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1. A complainant notifies the Title IX Coordinator in writing that the complainant would like to withdraw the formal complaint or any allegations therein;
2. The respondent is no longer enrolled or employed by ILTexas; or
3. Specific circumstances prevent ILTexas from gathering evidence sufficient to reach a determination as to the formal complaint or allegations therein.

Upon a dismissal of a formal complaint, ILTexas must promptly send written notice of the dismissal and reason(s) therefore simultaneously to the parties.

34 C.F.R. 106.45(b)(3).

iii. Consolidation of Formal Complaints

ILTexas may consolidate formal complaints as to allegations of sexual harassment against more than one complainant against one or more respondents, or by one party against the other party, where the allegations of sexual harassment arise out of the same facts or circumstances. Where a Title IX formal complaint process involves more than one complainant or more than one respondent, references in this section to the singular “party,” “complainant,” or “respondent” include the plural, as applicable. 34 C.F.R. 106.45(b)(4).

iv. Investigating Formal Complaints

When investigating a formal complaint and throughout the Title IX formal complaint process, ILTexas must:

1. Ensure that the burden of proof and the burden of gathering evidence sufficient to reach a determination regarding responsibility rest on ILTexas and not on the parties, provided that ILTexas cannot access, consider, disclose, or otherwise use a party’s records that are made or maintained by a physician, psychiatrist, psychologist, or other recognized professional or paraprofessional acting in the professional’s or paraprofessional’s capacity, or assisting in that capacity, and which are made and maintained in connection with the provision of treatment to the party, unless ILTexas obtains that party’s voluntary, written consent to do so for a Title IX formal complaint. If a party is not an “eligible student,” as defined in the FERPA regulations, ILTexas must obtain the voluntary, written consent of a “parent,” as defined in the FERPA regulations.
2. Provide an equal opportunity for the parties to present witnesses, including fact and expert witnesses, and other inculpatory and exculpatory evidence.
3. Not restrict the ability of either party to discuss the allegations under investigation or to gather and present relevant evidence.
4. Provide the parties with the same opportunities to have others present during any Title IX formal complaint proceeding, including the opportunity to be accompanied to

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- any related or proceeding by the advisor of their choice, who may be, but is not required to be, and attorney, and not limit the choice or presence of the advisor for either the complainant or respondent in any meeting or Title IX formal complaint proceeding; however, ILTexas may establish restrictions regarding the extent to which the advisor may participate in the proceedings, as long as the restrictions apply equally to both parties.
5. Provide, to a party whose participation is invited or expected, written notice of the date, time, location, participants, and purpose of all hearings (if applicable), investigative interviews, or other meetings, with sufficient time for the party to prepare to participate.
  6. Provide both parties an equal opportunity to inspect and review any evidence obtained as part of the investigation that is directly related to the allegations raised in a formal complaint, including the evidence upon which ILTexas does not intend to rely in reaching a determination regarding responsibility and inculpatory or exculpatory evidence whether obtained from a party or other source, so that each party can meaningfully respond to the evidence prior to conclusion of the investigation. Prior to completion of the investigative report, ILTexas must send to each party and the party’s advisor, if any, the evidence subject to inspection and review in an electronic format or a hard copy, and the parties must have at least ten days to submit a written response, which the investigator will consider prior to completion of the investigative report. ILTexas must make all such evidence subject to the parties’ inspection and review available at any hearing (if applicable) to give each party equal opportunity to refer to such evidence during the hearing, including for purposes of cross-examination.
  7. Create an investigative report that fairly summarizes relevant evidence and, at least ten days prior to a hearing (if a hearing is required or otherwise provided) or other time of determination regarding responsibility, send to each party and the party’s advisor, if any, the investigative report in an electronic format or a hard copy, for their review and written response.

34 C.F.R. 106.45(b)(5).

v. Hearings

ILTexas Title IX formal complaint process may, but need not, provide for a hearing. With or without a hearing, after ILTexas has sent to the investigate report to the parties and before reaching a determination regarding responsibility, the decision-maker(s) must afford each party the opportunity to submit written, relevant questions that a party wants asked of any party or witness, provide each party with the answers, and allow for additional, limited follow-up questions from each party. With or without a hearing, questions and evidence about the complainant’s sexual predisposition or prior sexual behavior are not relevant, unless such questions and evidence about the complainant’s prior sexual behavior are offered to prove that someone other than the respondent committed the conduct alleged by the complainant, or if the questions and evidence concern specific incidents of the complainant’s prior sexual behavior with respect to the respondent and are offered to prove consent. The decision-maker(s) must explain to the party

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proposing the questions any decision to exclude a question as not relevant. *34 C.F.R. 106.45(b)(6)(ii)*.

vi. *Determination Regarding Responsibility*

The decision-maker(s), who cannot be the same person(s) as the Title IX Coordinator or the investigator(s), must issue a written determination regarding responsibility. To reach this determination, ILTexas must apply the same standard of evidence described at “Process for Title IX Formal Complaint, Sec. 3(h) above. The written determination must include:

1. Identification of the allegations potentially constituting sexual harassment.
2. A description of the procedural steps taken from receipt of the formal complaint through the determination, including any notifications to the parties, interviews with parties and witnesses, site visits, methods used to gather other evidence, and hearings held (if any).
3. Findings of fact supporting the determination.
4. Conclusions regarding the application of ILTexas Code of Conduct to the facts.
5. A statement of, and rationale for, the result as to each allegation, including a determination regarding responsibility, any disciplinary sanctions ILTexas imposes on the respondent, and whether remedies designed to restore or preserve equal access to ILTexas education program or activity will be provided by ILTexas to the complainant.
6. ILTexas procedures and permissible bases for the complainant and respondent to appeal.

ILTexas must provide the written determination to the parties simultaneously. The determination regarding responsibility becomes final either on the date that ILTexas provides the parties with the written determination of the result of the appeal, if an appeal is filed, or if an appeal is not filed, the date on which an appeal would no longer be considered timely.

*34 C.F.R. 106.45(b)(7)(i)-(iii)*.

The Title IX Coordinator is responsible for effective implementation of any remedies identified in a determination regarding responsibility. *34 C.F.R. 106.45(b)(7)(iv)*.

vii. *Appeals*

ILTexas must offer both parties an appeal from a determination regarding responsibility, and from ILTexas dismissal of a formal complaint or any allegations therein, on the following bases:

1. Procedural irregularity that affected the outcome of the matter;
2. New evidence that was not reasonably available at the time the determination on responsibility or dismissal was made, that could affect the outcome of the matter; and

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3. The Title IX Coordinator, investigator(s), or decision-maker(s) had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that affected the outcome of the matter.

ILTexas may offer an appeal equally to both parties on additional bases.

As to all appeals, ILTexas must:

1. Notify the other party in writing when an appeal is filed and implement appeal procedures equally for both parties;
2. Ensure that the decision-maker(s) for the appeal is not the same person as the decision-maker(s) that reached the determination regarding responsibility or dismissal, the investigator(s), or the Title IX Coordinator;
3. Ensure that the decision-maker(s) for the appeal complies with standards regarding conflict of interest and bias found in the Title IX regulations (as discussed in “Process for Formal Title IX Complaint,” Sec. 3(h) above);
4. Give both parties a reasonable, equal opportunity to submit a written statement in support of, or challenging, the outcome;
5. Issue a written decision describing the result of the appeal and the rationale for the result; and
6. Provide the written decision simultaneously to both parties.

34 C.F.R. 106.45(b)(8).

**i) *Informal Resolution***

ILTexas may not require as a condition of enrollment or continuing enrollment, or employment or continuing employment, or enjoyment of any other right, waiver of the right to an investigation and adjudication of formal complaints of sexual harassment consistent with Title IX. Similarly, ILTexas may not require the parties to participate in an informal resolution process and may not offer an informal resolution process unless a formal complaint is filed. However, at any time prior to reaching a determination regarding responsibility, ILTexas may facilitate an informal resolution process, such as mediation, that does not involve a full investigation and adjudication.

With respect to informal resolution, ILTexas must provide written notice to the parties disclosing:

1. The allegations;
2. The requirements of the informal resolution process including the circumstances under which it precludes the parties from resuming a formal complaint arising from the same allegations, provided, however, that at any time prior to agreeing to a resolution, any party has the right to withdraw from the informal resolution process and resume the grievance process with respect to the formal complaint; and

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3. Any consequences resulting from participating in the informal resolution process, including the records that will be maintained or could be shared.

ILTexas also must obtain the parties' voluntary, written consent to the informal resolution process.

ILTexas cannot offer or facilitate an informal resolution process to resolve allegations that an employee sexually harassed a student.

*34 C.F.R. 106.45(b)(9).*

**j) Recordkeeping**

ILTexas must maintain for a period of seven years records of:

1. Each sexual harassment investigation including any determination regarding responsibility, any disciplinary sanctions imposed on the respondent, and any remedies provided to the complainant designed to restore or preserve equal access to ILTexas education program or activity;
2. Any appeal and the result therefrom;
3. Any informal resolution and the result therefrom; and
4. All materials used to train Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process. ILTexas must make these training materials publicly available on its website or, if ILTexas does not maintain a website, ILTexas must make these materials available upon request for inspection by members of the public.

For each response required under "Response by Title IX Coordinator," Sec. 3(g) above, ILTexas must create and maintain for a period of seven years records of any actions, including any supportive measures, taken in response to a report or formal complaint of sexual harassment. In each instance, ILTexas must document the basis for its conclusion that its response was not deliberately indifferent, and document that it has taken measures designed to restore or preserve equal access to ILTexas education program or activity.

If ILTexas does not provide a complainant with supportive measures, ILTexas must document the reasons why such a response was not clearly unreasonable in light of the known circumstances. The documentation of certain bases or measures does not limit ILTexas in the future from providing additional explanations or detailing additional measures taken.

*34 C.F.R. 106.45(b)(10).*

**k) Retaliation Prohibited**

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Neither ILTexas nor any other person may intimidate, threaten, coerce, or discriminate against any individual for the purpose of interfering with any right or privilege secured by Title IX, or because the individual has made a report or complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing under Title IX.

Intimidation, threats, coercion, or discrimination, including charges against an individual for Code of Conduct violations that do not involve sex discrimination or sexual harassment, but arise out of the same facts or circumstances as a report or complaint of sex discrimination, or a report or formal complaint of sexual harassment, for the purpose of interfering with any right or privilege secured by Title IX, constitutes retaliation.

Complaints alleging retaliation may be filed according to the “Process for Formal Title IX Complaint,” Sec. 3(h) above.

The exercise of rights protected under the First Amendment does not constitute retaliation prohibited by Title IX.

Charging an individual with a Code of Conduct violation for making a materially false statement in bad faith in the course of a Title IX formal complaint proceeding does not constitute retaliation prohibited by Title IX provided, however, that a determination regarding responsibility alone is not sufficient to conclude that any party made a materially false statement in bad faith.

*34 C.F.R. 106.71(a)-(b).*

**l) Confidentiality**

ILTexas must keep confidential the identity of any individual who has made a report or complaint of sex discrimination, including any individual who has made a report or filed a formal complaint of sexual harassment, any complainant, any individual who has been reported to be the perpetrator of sex discrimination, any respondent, and nay witness, except as may be permitted by the Family Educational Rights and Privacy Act (“FERPA”) statute, 20 U.S.C. 1232g, or FERPA regulations, 34 C.F.R. part 99, or as required by law, or to carry out the purposes of the Title IX regulations at 34 C.F.R. part 106, including the conduct of any investigation, hearing, or judicial proceeding arising thereunder. *34 C.F.R. 106.71(a).*

**m) Relationship to General Non-Discrimination Policy**

The formal complaint investigation and resolution process outlined above in Section 3 applies only to formal complaints alleging sexual harassment under Title IX, but not to complaints alleging sex discrimination that do not constitute sexual harassment. Complaints of sex discrimination that do not constitute sexual harassment may be filed with the Title IX Coordinator and will be handled under ILTexas general process for receiving reports of suspected discrimination and harassment, as outlined in Section 2 above.

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**Sec. 4. ACCESS TO POLICY**

Information regarding this policy shall be distributed annually to ILTexas employees and distributed to parents and students through the Student Handbook. Copies of the policy shall be readily available at each campus and the ILTexas administrative offices.

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**Sec. 1. NONDISCRIMINATION STATEMENT**

ILTexas strictly prohibits discrimination, including harassment, against an employee on the basis of race, color, religion, gender, national origin, age, disability, genetic information, or any other legally protected classification. Retaliation against anyone involved in the complaint process is also a violation of ILTexas policy.

For purposes of this policy, “employee” includes current employees, volunteers and applicants for employment.

**Sec. 2. GENERAL NON-DISCRIMINATION POLICY**

**a) *Prohibited Conduct***

In this policy, the term “prohibited conduct” includes discrimination, harassment, and/or retaliation as defined by this policy, even if the behavior does not rise to the level of unlawful conduct.

**i. Prohibited Discrimination**

Discrimination is defined as conduct directed at an employee on the basis of race, color, religion, gender, national origin, age, disability, genetic information or any other basis prohibited by law, that adversely affects his or her employment.

**ii. Prohibited Harassment**

Prohibited harassment of an employee is defined as unwelcome conduct that is based on race, color, religion, sex (including pregnancy), national origin, age (40 or older), disability or genetic information where:

1. Enduring the offensive conduct becomes a condition of continued employment; or
2. The conduct is severe or pervasive enough to create a work environment that a reasonable person would consider intimidating, hostile or abusive.

Harassment may also occur when unwelcome conduct based on an employee’s protected characteristic is so severe, persistent, or pervasive that the conduct:

1. Has the purpose or effect of unreasonably interfering with the employee’s work performance;
2. Creates an intimidating, threatening, hostile, or offensive work environment; or
3. Otherwise adversely affects the employee’s performance, environment, or employment opportunities.

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Prohibited harassment may include, but is not limited to, offensive or derogatory language directed at another person’s religious beliefs or practices, accent, skin color, gender identity, or need for workplace accommodation; threatening or intimidating conduct; offensive jokes, name calling, slurs, or rumors; physical aggression or assault; display of graffiti or printed material promoting racial, ethnic, or other stereotypes; or other types of aggressive conduct such as theft or damage to property.

iii. *Prohibited Gender-Based Harassment*

Gender-based harassment includes physical, verbal, or nonverbal conduct based on an employee’s gender, the employee’s expression of characteristics perceived as stereotypical for the employee’s gender, or the employee’s failure to conform to stereotypical notions of femininity or masculinity.

Examples of gender-based harassment, regardless of the employee’s or alleged harasser’s actual or perceived gender, may include offensive jokes, name-calling, slurs, or rumors; physical aggression or assault; threatening or intimidating conduct; or other kinds of aggressive conduct such as theft or damage to property.

iv. *Prohibited Retaliation*

ILTexas expressly prohibits retaliation against an employee who makes a claim alleging to have experienced discrimination or harassment, or an employee who, in good faith, makes a report, serves as a witness, or otherwise participates in an investigation.

Examples of retaliation may include termination, refusal to hire, demotion, and denial of promotion. Retaliation may also include threats, unjustified negative evaluations, unjustified negative references, or increased surveillance.

v. *False Claims*

An employee who intentionally makes a false claim, offers false statements, or refuses to cooperate or participate in an investigation regarding discrimination or harassment is subject to discipline, up to and including termination of employment.

**b) *Reporting Prohibited Conduct (Non-Sexual Harassment)***

An employee who believes that he or she has experienced prohibited conduct, or that another employee has experienced prohibited conduct, should immediately report the alleged conduct to the Principal or his or her supervisor, or to one of the school officials identified below.

In this policy, “prohibited conduct” includes discrimination, harassment, and/or retaliation, even if the behavior does not rise to the level of unlawful conduct.

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The reporting procedures in this Section 2 will apply to all allegations of prohibited conduct other than allegations of harassment prohibited by Title IX. For allegations of sex-based harassment that, if proved, would meet the definition of sexual harassment under Title IX (including sexual harassment), see the procedures below at Section 3, Sexual Harassment Prohibited – Title IX Policy.

i. *Title IX Coordinator*

The Title IX Coordinator is responsible for coordinating ILTexas efforts to comply with its responsibilities under Title IX with respect to discrimination based on sex, including sexual harassment. ILTexas designates the following person(s) to coordinate its efforts to comply with Title IX of the Education Amendments of 1972, as amended:

Victor Cathey, Position: Executive Director of Athletics and Physical Fitness, Address: 1820 N. Glenville Dr. Suite 100, Richardson, TX 75081, Telephone: 972-479-9078. vcathey@iltexas.org

ii. *ADA/Section 504 Coordinator*

ILTexas designates the following person to coordinate its efforts to comply with legal requirements concerning discrimination on the basis of disability:

Mary Albritton, Position: Director of Counseling, Address: 1820 N. Glenville Dr. Suite 100, Richardson, TX 75081, Telephone: 972-479-9078. malbritton@iltexas.org

iii. *Title VII/Age Coordinator*

ILTexas designates the following person to coordinate its efforts to comply with legal requirements concerning discrimination on the basis of race, color, national origin, and age:

Regina Jones, Position: Chief Equity Officer, Address: 1820 Glenville Dr. Richardson, TX 75081, Telephone: 972-479-9078. Rjones@iltexas.org

iv. *All Other Complaints*

Reports concerning prohibited conduct against the Title IX Coordinator, ADA/Section 504 Coordinator, and/or Title VII/Age Coordinator may be made to the Superintendent or designee. Reports concerning prohibited conduct against the Superintendent or designee may be directed to the Board.

**c) *Timely Reporting***

Employees shall report prohibited conduct as soon as possible after the alleged act or knowledge of the alleged act.

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Any supervisor who receives a report of prohibited conduct shall immediately inform the appropriate ILTexas official identified above.

**d) *Investigating Reports of Prohibited Conduct***

ILTexas may request, but not insist upon, a written report describing any alleged prohibited conduct. If a report is made orally, the ILTexas official receiving the report shall reduce the report to writing.

After receiving a report or notice of a report, the appropriate Compliance Coordinator shall determine if the allegations, if proven, would constitute prohibited conduct under this policy. If so, the Compliance Coordinator shall immediately authorize or conduct an investigation, regardless of whether a criminal or regulatory investigation concerning the allegations is pending. The investigation may be conducted by the Compliance Coordinator or designee, or by a third party authorized by ILTexas, such as an attorney. The employee’s Principal or supervisor shall be notified of the investigation, if appropriate.

The investigation may consist of personal interviews of individuals with knowledge of the allegations, including the person making the report, and the person against whom the report is filed. The investigation may also include consideration of documents or other information concerning the allegations.

If appropriate, ILTexas shall take prompt action to prevent prohibited conduct from occurring during the course of the investigation.

i. *Concluding the Investigation*

Investigations of prohibited conduct should be completed as soon as reasonably possible and appropriate under the circumstances. The investigator shall prepare a written report of the investigation, and provide the report to the ILTexas official overseeing the investigation.

ii. *School Action*

If an investigation indicates that prohibited conduct occurred, ILTexas shall promptly take appropriate disciplinary or corrective action to address the conduct.

ILTexas may also take action following an investigation, even if the alleged conduct did not rise to the level of prohibited or unlawful conduct.

iii. *Confidentiality*

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ILTexas shall respect the privacy of all individuals involved in a report or investigation of prohibited conduct. Limited disclosures may be necessary.

iv. Appeal

A complainant who is dissatisfied with the outcome of an investigation may appeal through Board Policy PG-XX (Employee Complaints and Grievances – General).

e) **Records Retention**

Copies of reports alleging prohibited conduct, investigation reports, and other related records shall be maintained for at least three years.

**Sec. 3. SEXUAL HARASSMENT PROHIBITED – TITLE IX POLICY**

a) **Definitions for Title IX Terms**

i. Actual Knowledge

“Actual knowledge” means notice of sexual harassment or allegations of sexual harassment to ILTexas Title IX Coordinator or any ILTexas official who has authority to institute corrective measures on behalf of ILTexas, or to any employee of an elementary and secondary school. Imputation of knowledge based solely on vicarious liability or constructive notice is insufficient to constitute actual knowledge. This standard is not met when the only official of ILTexas with actual knowledge is the respondent (as that term is defined below). The mere ability or obligation to report sexual harassment or to inform a student about how to report sexual harassment, or having been trained to do so, does not qualify an individual as one who has authority to institute corrective measures on behalf of ILTexas. “Notice” as used in this definition includes, but is not limited to, a report of sexual harassment to the Title IX Coordinator. *34 C.F.R. 106.30(a)*.

ii. Complainant

“Complainant” means an individual who is alleged to be the victim of conduct that could constitute sexual harassment. *34 C.F.R. 106.30(a)*.

iii. Consent

“Consent” is not currently defined by the Title IX regulations, nor do the regulations require ILTexas to adopt a particular definition of consent with respect to sexual assault. *34 C.F.R. 106.30(a)*.

iv. Deliberate Indifference Standard

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If ILTexas has actual knowledge of sexual harassment in an education program or activity of a person in the United States, it must respond promptly in a manner that is not deliberately indifferent. ILTexas is deliberately indifferent only if its response to sexual harassment is clearly unreasonable in light of the known circumstances. *34 C.F.R. 106.44.*

v. Education Program or Activity

For purposes of this Title IX policy, “education program or activity” includes locations, events, or circumstances over which ILTexas exercised substantial control over both the respondent and the context in which sexual harassment occurs. *34 C.F.R. 106.44.*

vi. Formal Complaint

“Formal complaint” means a document filed by a complainant or signed by the Title IX Coordinator alleging sexual harassment against a respondent and requesting that ILTexas investigate the allegation of sexual harassment. At the time of filing a formal complaint, a complainant must be participating in or attempting to participate in ILTexas education program or activity. A formal complaint may be filed with the Title IX Coordinator in person, by mail, or by email, by using the contact information for the Title IX Coordinator provided by ILTexas, and by any additional method designated by ILTexas. As used in this definition, the term “document filed by a complainant” means a document or electronic submission (such as by email or through an online portal provided for this purpose by ILTexas) that contains the complainant’s physical or digital signature, or otherwise indicates that the complainant is the person filing the formal complaint. Where the Title IX Coordinator signs a formal complaint, the Title IX Coordinator is not a complainant or otherwise a party to the Title IX formal complaint, and must comply with the requirements of the Title IX formal process, including the informal resolution process. *34 C.F.R. 106.30(a).*

vii. Respondent

“Respondent” means an individual who has been reported to be the perpetrator of conduct that could constitute sexual harassment. *34 C.F.R. 106.30(a).*

viii. Sexual Harassment

“Sexual harassment” means conduct on the basis of sex that satisfies one or more of the following:

1. An employee of ILTexas conditioning the provision of an aid, benefit, or service of ILTexas on an individual’s participation in unwelcome sexual conduct;
2. Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to ILTexas education program or activity; or

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3. “Sexual assault” as defined in [20 U.S.C. 1091\(f\)\(6\)\(A\)\(v\)](#); “dating violence” as defined in [34 U.S.C. 12291\(a\)\(10\)](#); “domestic violence” as defined in [34 U.S.C. 12291\(a\)\(8\)](#); or “stalking” as defined in [34 U.S.C. 12291\(a\)\(30\)](#).

*34 C.F.R. 106.30(a).*

ix. *Supportive Measures*

“Supportive measures” means nondisciplinary, nonpunitive individualized services offered as appropriate, as reasonably available, and without fee or charge to the complainant or the respondent before or after the filing of a formal complaint or where no formal complaint has been filed. Such measures are designed to restore or preserve equal access to ILTexas education program or activity without unreasonably burdening the other party, including measures designed to protect the safety of all parties or ILTexas educational environment, or deter sexual harassment. Supportive measures may include counseling, extensions of deadlines or other course-related adjustments, modifications of work or class schedules, campus escort services, mutual restrictions on contact between the parties, changes in work, leaves of absence, increased security and monitoring of certain areas of the campus, and other similar measures. ILTexas must maintain as confidential any supportive measures provided to the complainant or respondent, to the extent that maintaining such confidentiality would not impair ILTexas ability to provide the supportive measures. The Title IX Coordinator is responsible for coordinating the effective implementation of supportive measures. *34 C.F.R. 106.30(a).*

**b) Requirement to Designate Title IX Coordinator**

ILTexas must designate at least one employee as a Title IX Coordinator to coordinate ILTexas efforts to comply with its requirements under Title IX.

**c) Notification of Title IX Policy**

ILTexas must notify applicants for admission and employment, students, parents or legal guardians of students, and all professional organizations holding professional agreements with ILTexas of the name or title, office address, email address, and telephone number of the employee or employees designated as the Title IX Coordinator.

ILTexas must also notify the individuals noted above that ILTexas does not discriminate on the basis of sex in the education program or activity that it operates, and that it is required under Title IX not to discriminate in such a manner. The notification must also state that the requirement not to discriminate in the education program or activity extends to admission and employment, and that inquiries about the application of Title IX to ILTexas may be referred to the designated Title IX Coordinator, to the assistant secretary for civil rights of the Department of Education, or both.

*34 C.F.R. 106.8(a), (b)(1).*

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**d) Handbook Information and Website Postings**

ILTexas must prominently display the contact information required to be listed for the Title IX Coordinator and the nondiscrimination policy described in “Notification of Title IX Policy,” above, on the ILTexas website, if any, and in the Employee Handbook and Student / Parent Handbook.

ILTexas may not use or distribute a publication stating that ILTexas treats applicants, students, or employees differently on the basis of sex except when such treatment is permitted by Title IX.

*34 C.F.R. 106.8(b)(2).*

**e) Reporting Sex Discrimination / Sexual Harassment**

Any person may report sex discrimination, including sexual harassment, whether or not the reporting person is the person alleged to be the victim of conduct that may constitute sex discrimination or sexual harassment. Reports may be made in person, by mail, by telephone, or by email through the contact information listed for ILTexas Title IX Coordinator, or by any other means that results in the Title IX Coordinator receiving the person’s verbal or written report. Reports may be made at any time (including during nonbusiness hours) by using the telephone number or email address, or by mail to the office address, listed for the Title IX Coordinator. *34 C.F.R. 106.8(a).*

**f) Complaint Procedures**

ILTexas must adopt and publish procedures that provide for the prompt and equitable resolution of student and employee complaints alleging any action that would be prohibited by Title IX, and a formal Title IX complaint process that complies with applicable federal regulations.

ILTexas must provide notice to the individuals identified in Sec. 3(c) above of the school’s procedures and Title IX formal complaint process, including how to report or file a complaint of sex discrimination, how to report or file a formal complaint of sexual harassment, and how ILTexas will respond.

The requirements of this provision apply only to sex discrimination occurring against a person in the United States.

*34 C.F.R. 106.8(c)-(d).*

**g) Response by Title IX Coordinator**

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The Title IX Coordinator must promptly contact the complainant to discuss the availability of supportive measures, consider the complainant’s wishes with respect to supportive measures, , inform the complainant of the availability of supportive measures with or without the filing of a formal complaint, and explain to the complainant the process for filing a formal complaint.

i. Required Supportive Measures

ILTexas response must treat complainants and respondents equitably by offering supportive measures and by following a grievance process that complies with the Title IX regulations (*see* Process for Formal Title IX Complaint, Sec. 3(h) below) before the imposition of any disciplinary sanctions or other actions that are not supportive measures against a respondent.

34 C.F.R. 106.44(a).

ii. Response to Formal Complaint

In response to a formal complaint, ILTexas must follow a process that complies with the Title IX regulations (*see* Process for Formal Title IX Complaint, Sec. 3(h) below).

34 C.F.R. 106.44(b)(1).

iii. Emergency Removals

ILTexas is not precluded from removing a respondent from its education program or activity on an emergency basis, provided that ILTexas:

1. Undertakes an individualized safety and risk analysis;
2. Determines that an immediate threat to the physical health or safety of any student or other individual arising from the allegations of sexual harassment justifies removal; and
3. Provides the respondent with notice and an opportunity to challenge the decision immediately following the removal.

This may not be construed to modify any rights under the Individuals with Disabilities Education Act, Section 504 of the Rehabilitation Act of 1973, or the Americans with Disabilities Act.

34 C.F.R. 106.44(c).

iv. Administrative Leave

ILTexas is not prohibited from placing a nonstudent employee respondent on administrative leave during the pendency of a Title IX formal complaint. This does not modify any rights under Section 504 of the Rehabilitation Act of 1973 or the Americans with Disabilities Act. 34 C.F.R. 106.44(d).

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**h) *Process for Title IX Formal Complaint***

For purposes of addressing formal complaints of sexual harassment, ILTexas process must comply with the requirements listed in this section. Any provisions, rules, or practices other than those required by the Title IX regulations or this policy that ILTexas adopts as part of its process for handling formal complaints of sexual harassment must apply equally to both parties. *34 C.F.R. 106.45(b)*.

ILTexas Title IX formal complaint process must:

1. Treat complainants and respondents equally by providing remedies to a complainant where a determination of responsibility for sexual harassment has been made against the respondent, and by following a process that complies with the Title IX regulations before the imposition of any disciplinary sanctions or other actions that are not supportive measures against a respondent. Remedies must be designed to restore or preserve equal access to ILTexas education program or activity. Such remedies may include the same individualized services described as supportive measures; however, remedies need not be nondisciplinary or nonpunitive and need not avoid burdening the respondent.
2. Require an objective evaluation of all relevant evidence—including both inculpatory and exculpatory evidence—and provide that credibility determinations may not be based on a person’s status as a complainant, respondent, or witness.
3. Require that any individual designated by ILTexas as a Title IX Coordinator, investigator, decision-maker, or any person designated by ILTexas to facilitate an informal resolution process, not to have a conflict of interest or bias for or against complainants or respondents generally or an individual complainant or respondent. ILTexas must ensure that Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process receive training on the definition of sexual harassment, the scope of ILTexas education program or activity, how to conduct an investigation and Title IX formal complaint process (including hearings, appeals, and informal resolution processes, as applicable), and how to serve impartially, including by avoiding prejudgment of the facts at issue, conflicts of interest, and bias. ILTexas must ensure that decision-makers receive training on any technology to be used at a live hearing, if any, and on issues of relevance of questions and evidence, including when questions and evidence about the complainant’s sexual predisposition or prior sexual behavior are not relevant. ILTexas must also ensure that investigators receive training on relevance to create an investigative report that fairly summarizes relevant evidence. Any materials used to train Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process must not rely on sex stereotypes and must promote impartial investigations and adjudications of formal complaints of sexual harassment.

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4. Include a presumption that the respondent is not responsible for the alleged conduct until a determination regarding responsibility is made at the conclusion of the Title IX formal complaint process.
5. Include reasonably prompt timeframes for concluding the grievance process, including reasonably prompt timeframes for filing and resolving appeals and informal resolution processes if ILTexas offers informal resolution processes, and a process that allows for the temporary delay of the Title IX formal complaint process or the limited extension of time frames for good cause with written notice to the complainant and the respondent of the delay or extension and the reasons for the action. Good cause may include considerations such as the absence of a party, a party’s advisor, or a witness; concurrent law enforcement activity; or the need for language assistance or accommodation of disabilities.
6. Describe the range of possible disciplinary sanctions and remedies or list the possible disciplinary sanctions and remedies that ILTexas may implement following any determination of responsibility.
7. State whether the standard of evidence to be used to determine responsibility is the preponderance of the evidence standard or the clear and convincing evidence standard, apply the same standard of evidence for formal complaints against students as for formal complaints against employees, including faculty, and apply the same standard of evidence to all formal complaints of sexual harassment.
8. Include the procedures and permissible bases for the complainant and respondent to appeal.
9. Describe the range of supportive measures available to complainants and respondents.
10. Not require, allow, rely upon, or otherwise use questions or evidence that constitute, or seek disclosure of, information protected under a legally-recognized privilege, unless the person holding such privilege has waived the privilege.

34 C.F.R. 106.45(b)(1).

i. Notice of Allegations

Upon receipt of a formal complaint, ILTexas must provide the following written notice to the parties who are known:

1. Notice of ILTexas Title IX formal complaint process, including any informal resolution process.
2. Notice of the allegations of sexual harassment potentially constituting sexual harassment, including sufficient details known at the time and with sufficient time to prepare a response before any initial interview. Sufficient details include:
  - a. The identities of the parties involved in the incident, if known;
  - b. The conduct allegedly constituting sexual harassment; and
  - c. The date and location of the alleged incident, if known.

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The written notice must include a statement that the respondent is presumed not responsible for the alleged conduct and that a determination regarding responsibility is made at the conclusion of the Title IX formal complaint process. The written notice must inform the parties that they may have an advisor of their choice, who may be, but is not required to be, an attorney and may inspect and review evidence. The written notice must inform the parties of any provision in ILTexas Code of Conduct that prohibits knowingly making false statements or knowingly submitting false information during the Title IX formal complaint process.

If, in the course of an investigation, ILTexas decides to investigate allegations about the complainant or respondent that are not included in the notice of allegations, ILTexas must provide notice of the additional allegations to the parties whose identities are known.

*34 C.F.R. 106.45(b)(2).*

ii. *Dismissal of Formal Complaint*

ILTexas must investigate the allegations in a formal complaint.

If the conduct alleged in the formal complaint would not constitute sexual harassment even if proved, did not occur in ILTexas education program or activity, or did not occur against a person in the United States, then ILTexas must dismiss the formal complaint with regard to that conduct for purposes of sexual harassment under Title IX; such a dismissal does not preclude action under another provision of ILTexas Code of Conduct.

ILTexas may dismiss the formal complaint or any allegations therein if, at any time during the investigation or hearing (if applicable):

1. A complainant notifies the Title IX Coordinator in writing that the complainant would like to withdraw the formal complaint or any allegations therein;
2. The respondent is no longer enrolled or employed by ILTexas; or
3. Specific circumstances prevent ILTexas from gathering evidence sufficient to reach a determination as to the formal complaint or allegations therein.

Upon a dismissal of a formal complaint, ILTexas must promptly send written notice of the dismissal and reason(s) therefore simultaneously to the parties.

*34 C.F.R. 106.45(b)(3).*

iii. *Consolidation of Formal Complaints*

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ILTexas may consolidate formal complaints as to allegations of sexual harassment against more than one complainant against one or more respondents, or by one party against the other party, where the allegations of sexual harassment arise out of the same facts or circumstances. Where a Title IX formal complaint process involves more than one complainant or more than one respondent, references in this section to the singular “party,” “complainant,” or “respondent” include the plural, as applicable. *34 C.F.R. 106.45(b)(4)*.

iv. *Investigating Formal Complaints*

When investigating a formal complaint and throughout the Title IX formal complaint process, ILTexas must:

1. Ensure that the burden of proof and the burden of gathering evidence sufficient to reach a determination regarding responsibility rest on ILTexas and not on the parties, provided that ILTexas cannot access, consider, disclose, or otherwise use a party’s records that are made or maintained by a physician, psychiatrist, psychologist, or other recognized professional or paraprofessional acting in the professional’s or paraprofessional’s capacity, or assisting in that capacity, and which are made and maintained in connection with the provision of treatment to the party, unless ILTexas obtains that party’s voluntary, written consent to do so for a Title IX formal complaint. If a party is not an “eligible student,” as defined in the FERPA regulations, ILTexas must obtain the voluntary, written consent of a “parent,” as defined in the FERPA regulations.
2. Provide an equal opportunity for the parties to present witnesses, including fact and expert witnesses, and other inculpatory and exculpatory evidence.
3. Not restrict the ability of either party to discuss the allegations under investigation or to gather and present relevant evidence.
4. Provide the parties with the same opportunities to have others present during any Title IX formal complaint proceeding, including the opportunity to be accompanied to any related or proceeding by the advisor of their choice, who may be, but is not required to be, an attorney, and not limit the choice or presence of the advisor for either the complainant or respondent in any meeting or Title IX formal complaint proceeding; however, ILTexas may establish restrictions regarding the extent to which the advisor may participate in the proceedings, as long as the restrictions apply equally to both parties.
5. Provide, to a party whose participation is invited or expected, written notice of the date, time, location, participants, and purpose of all hearings (if applicable), investigative interviews, or other meetings, with sufficient time for the party to prepare to participate.
6. Provide both parties an equal opportunity to inspect and review any evidence obtained as part of the investigation that is directly related to the allegations raised in a formal complaint, including the evidence upon which ILTexas does not intend to rely in reaching a determination regarding responsibility and inculpatory or exculpatory evidence whether obtained from a party or other source, so that each party can

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- meaningfully respond to the evidence prior to conclusion of the investigation. Prior to completion of the investigative report, ILTexas must send to each party and the party’s advisor, if any, the evidence subject to inspection and review in an electronic format or a hard copy, and the parties must have at least ten days to submit a written response, which the investigator will consider prior to completion of the investigative report. ILTexas must make all such evidence subject to the parties’ inspection and review available at any hearing (if applicable) to give each party equal opportunity to refer to such evidence during the hearing, including for purposes of cross-examination.
7. Create an investigative report that fairly summarizes relevant evidence and, at least ten days prior to a hearing (if a hearing is required or otherwise provided) or other time of determination regarding responsibility, send to each party and the party’s advisor, if any, the investigative report in an electronic format or a hard copy, for their review and written response.

*34 C.F.R. 106.45(b)(5).*

v. Hearings

ILTexas Title IX formal complaint process may, but need not, provide for a hearing. With or without a hearing, after ILTexas has sent to the investigate report to the parties and before reaching a determination regarding responsibility, the decision-maker(s) must afford each party the opportunity to submit written, relevant questions that a party wants asked of any party or witness, provide each party with the answers, and allow for additional, limited follow-up questions from each party. With or without a hearing, questions and evidence about the complainant’s sexual predisposition or prior sexual behavior are not relevant, unless such questions and evidence about the complainant’s prior sexual behavior are offered to prove that someone other than the respondent committed the conduct alleged by the complainant, or if the questions and evidence concern specific incidents of the complainant’s prior sexual behavior with respect to the respondent and are offered to prove consent. The decision-maker(s) must explain to the party proposing the questions any decision to exclude a question as not relevant. *34 C.F.R. 106.45(b)(6)(ii).*

vi. Determination Regarding Responsibility

The decision-maker(s), who cannot be the same person(s) as the Title IX Coordinator or the investigator(s), must issue a written determination regarding responsibility. To reach this determination, ILTexas must apply the same standard of evidence described at “Process for Title IX Formal Complaint, Sec. 3(h) above. The written determination must include:

1. Identification of the allegations potentially constituting sexual harassment.
2. A description of the procedural steps taken from receipt of the formal complaint through the determination, including any notifications to the parties, interviews with

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- parties and witnesses, site visits, methods used to gather other evidence, and hearings held (if any).
- 3. Findings of fact supporting the determination.
- 4. Conclusions regarding the application of ILTexas Code of Conduct to the facts.
- 5. A statement of, and rationale for, the result as to each allegation, including a determination regarding responsibility, any disciplinary sanctions ILTexas imposes on the respondent, and whether remedies designed to restore or preserve equal access to ILTexas education program or activity will be provided by ILTexas to the complainant.
- 6. ILTexas procedures and permissible bases for the complainant and respondent to appeal.

ILTexas must provide the written determination to the parties simultaneously. The determination regarding responsibility becomes final either on the date that ILTexas provides the parties with the written determination of the result of the appeal, if an appeal is filed, or if an appeal is not filed, the date on which an appeal would no longer be considered timely.

*34 C.F.R. 106.45(b)(7)(i)-(iii).*

The Title IX Coordinator is responsible for effective implementation of any remedies identified in a determination regarding responsibility. *34 C.F.R. 106.45(b)(7)(iv).*

vii. Appeals

ILTexas must offer both parties an appeal from a determination regarding responsibility, and from ILTexas dismissal of a formal complaint or any allegations therein, on the following bases:

- 1. Procedural irregularity that affected the outcome of the matter;
- 2. New evidence that was not reasonably available at the time the determination on responsibility or dismissal was made, that could affect the outcome of the matter; and
- 3. The Title IX Coordinator, investigator(s), or decision-maker(s) had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that affected the outcome of the matter.

ILTexas may offer an appeal equally to both parties on additional bases.

As to all appeals, ILTexas must:

- 1. Notify the other party in writing when an appeal is filed and implement appeal procedures equally for both parties;
- 2. Ensure that the decision-maker(s) for the appeal is not the same person as the decision-maker(s) that reached the determination regarding responsibility or dismissal, the investigator(s), or the Title IX Coordinator;

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3. Ensure that the decision-maker(s) for the appeal complies with standards regarding conflict of interest and bias found in the Title IX regulations (as discussed in “Process for Formal Title IX Complaint,” Sec. 3(h) above);
4. Give both parties a reasonable, equal opportunity to submit a written statement in support of, or challenging, the outcome;
5. Issue a written decision describing the result of the appeal and the rationale for the result; and
6. Provide the written decision simultaneously to both parties.

34 C.F.R. 106.45(b)(8).

viii. Informal Resolution

ILTexas may not require as a condition of enrollment or continuing enrollment, or employment or continuing employment, or enjoyment of any other right, waiver of the right to an investigation and adjudication of formal complaints of sexual harassment consistent with Title IX. Similarly, ILTexas may not require the parties to participate in an informal resolution process and may not offer an informal resolution process unless a formal complaint is filed. However, at any time prior to reaching a determination regarding responsibility, ILTexas may facilitate an informal resolution process, such as mediation, that does not involve a full investigation and adjudication.

With respect to informal resolution, ILTexas must provide written notice to the parties disclosing:

1. The allegations;
2. The requirements of the informal resolution process including the circumstances under which it precludes the parties from resuming a formal complaint arising from the same allegations, provided, however, that at any time prior to agreeing to a resolution, any party has the right to withdraw from the informal resolution process and resume the grievance process with respect to the formal complaint; and
3. Any consequences resulting from participating in the informal resolution process, including the records that will be maintained or could be shared.

ILTexas also must obtain the parties’ voluntary, written consent to the informal resolution process.

ILTexas cannot offer or facilitate an informal resolution process to resolve allegations that an employee sexually harassed a student.

34 C.F.R. 106.45(b)(9).

ix. Recordkeeping

ILTexas must maintain for a period of seven years records of:

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1. Each sexual harassment investigation including any determination regarding responsibility, any disciplinary sanctions imposed on the respondent, and any remedies provided to the complainant designed to restore or preserve equal access to ILTexas education program or activity;
2. Any appeal and the result therefrom;
3. Any informal resolution and the result therefrom; and
4. All materials used to train Title IX Coordinators, investigators, decision-makers, and any person who facilitates an informal resolution process. ILTexas must make these training materials publicly available on its website or, if ILTexas does not maintain a website, ILTexas must make these materials available upon request for inspection by members of the public.

For each response required under “Response by Title IX Coordinator,” Sec. 3(g) above, ILTexas must create and maintain for a period of seven years records of any actions, including any supportive measures, taken in response to a report or formal complaint of sexual harassment. In each instance, ILTexas must document the basis for its conclusion that its response was not deliberately indifferent, and document that it has taken measures designed to restore or preserve equal access to ILTexas education program or activity.

If ILTexas does not provide a complainant with supportive measures, ILTexas must document the reasons why such a response was not clearly unreasonable in light of the known circumstances. The documentation of certain bases or measures does not limit ILTexas in the future from providing additional explanations or detailing additional measures taken.

*34 C.F.R. 106.45(b)(10).*

**i) *Retaliation Prohibited***

Neither ILTexas nor any other person may intimidate, threaten, coerce, or discriminate against any individual for the purpose of interfering with any right or privilege secured by Title IX, or because the individual has made a report or complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing under Title IX.

Intimidation, threats, coercion, or discrimination, including charges against an individual for Code of Conduct violations that do not involve sex discrimination or sexual harassment, but arise out of the same facts or circumstances as a report or complaint of sex discrimination, or a report or formal complaint of sexual harassment, for the purpose of interfering with any right or privilege secured by Title IX, constitutes retaliation.

Complaints alleging retaliation may be filed according to the “Process for Formal Title IX Complaint,” Sec. 3(h) above.

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The exercise of rights protected under the First Amendment does not constitute retaliation prohibited by Title IX.

Charging an individual with a Code of Conduct violation for making a materially false statement in bad faith in the course of a Title IX formal complaint proceeding does not constitute retaliation prohibited by Title IX provided, however, that a determination regarding responsibility alone is not sufficient to conclude that any party made a materially false statement in bad faith.

*34 C.F.R. 106.71(a)-(b).*

**j) Confidentiality**

ILTexas must keep confidential the identity of any individual who has made a report or complaint of sex discrimination, including any individual who has made a report or filed a formal complaint of sexual harassment, any complainant, any individual who has been reported to be the perpetrator of sex discrimination, any respondent, and any witness, except as may be permitted by the Family Educational Rights and Privacy Act (“FERPA”) statute, 20 U.S.C. 1232g, or FERPA regulations, 34 C.F.R. part 99, or as required by law, or to carry out the purposes of the Title IX regulations at 34 C.F.R. part 106, including the conduct of any investigation, hearing, or judicial proceeding arising thereunder. *34 C.F.R. 106.71(a).*

**k) Relationship to General Non-Discrimination Policy**

The formal complaint investigation and resolution process outlined above in Sec. 3(h) applies only to formal complaints alleging sexual harassment under Title IX, but not to complaints alleging sex discrimination that do not constitute sexual harassment. Complaints of sex discrimination that do not constitute sexual harassment may be filed with the Title IX Coordinator and will be handled under ILTexas general process for receiving reports of suspected discrimination and harassment, as outlined in Section 2 above.

**Sec. 4. DISTRIBUTION OF POLICY**

The Superintendent or designee shall ensure that this policy and accompanying procedures are made available to all employees through the ILTexas Employee Handbook.

**Sec. 5. LIABILITY FOR HARASSMENT**

ILTexas accepts no liability for harassment of any student or employee by another employee. Any ILTexas employee who is found to have engaged in prohibited conduct is subject to disciplinary action, up to and including termination.

ILTexas does not consider conduct in violation of this policy to be within the course and scope of employment or the direct consequences of the discharge of one’s duties. Accordingly, to the extent



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permitted by law, ILTexas reserves the right not to provide a defense or pay damages assessed against employees for conduct in violation of this policy.

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## **Title IX Formal Complaint Process for Sexual Harassment**

### **1. Title IX Statement of Nondiscrimination**

International Leadership of Texas (ILTexas) prohibits discrimination, including harassment, against any student on the basis of sex. Retaliation against anyone involved in the formal complaint process described below is a violation of ILTexas policy and is prohibited.

### **2. Sexual Harassment**

“Sexual harassment” means conduct on the basis of sex that satisfies one or more of the following:

1. An employee of ILTexas conditioning the provision of an aid, benefit, or service of ILTexas on an individual’s participation in unwelcome sexual conduct;
2. Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to ILTexas’ education program or activity; or
3. “Sexual assault” as defined in [20 U.S.C. 1091\(f\)\(6\)\(A\)\(v\)](#); “dating violence” as defined in [34 U.S.C. 12291\(a\)\(10\)](#); “domestic violence” as defined in [34 U.S.C. 12291\(a\)\(8\)](#); or “stalking” as defined in [34 U.S.C. 12291\(a\)\(30\)](#).

### **3. Definitions**

#### a) Title IX Official

For the purposes of this formal complaint process, a “Title IX Official” means the Title IX Coordinator/designee and campus administrators.

#### b) Complainant

A complainant is a student who is alleged to be the victim of sexual harassment.

#### c) Respondent

A respondent is the person who has been reported to be the perpetrator of conduct that could constitute sexual harassment.

#### d) Formal Complaint

A formal complaint means a document filed by a complainant (or complainant’s parent/guardian) or signed by the Title IX Coordinator alleging sexual harassment against a respondent and requesting that ILTexas investigate the allegation of sexual harassment. At the time of filing a formal complaint, a complainant must be participating in or attempting to participate in ILTexas’ education program or activity.

A formal complaint may be filed with the Title IX Coordinator in person, by mail, or by e-mail using the Title IX Coordinator’s contact information. A formal complaint may be a document or electronic submission (i.e., by e-mail or through an online portal provided by ILTexas that contains the complainant’s physical or digital signature, or otherwise indicates that the complainant is the individual filing the complaint.

**4. Reporting Procedures**

a) Student Report

Any student who believes that he or she has experienced sexual harassment or believes that another student has experienced sexual harassment should immediately report the alleged acts to a teacher, school counselor, principal, assistant principal, or ILTexas’ Title IX Coordinator/designee.

b) Parent Report

Any parent who suspects or receives notice that a student or group of students has or may have experienced sexual harassment shall promptly notify a campus administrator or the Title IX Coordinator.

c) Employee Report

Any ILTexas employee who suspects or receives notice that a student or group of students has or may have experienced sexual harassment shall promptly notify a campus administrator or the Title IX Coordinator.

d) Alternate Reporting Procedures

A student shall not be required to report prohibited conduct to the person alleged to have committed the conduct. Reports concerning sexual harassment, including reports against the Title IX coordinator, may be directed to the Superintendent. A report against the Superintendent may be made directly to the Board of Directors. If a report is made directly to the Board, the Board shall appoint an appropriate person to conduct an investigation.

e) Timely Reporting

Reports of sexual harassment shall be made as soon as possible after the alleged act or knowledge of the alleged act. A failure to promptly report may impair ILTexas’ ability to investigate and address the prohibited conduct.

f) Notice to Parents

Upon receipt of a formal complaint, the Title IX Official or designee shall promptly notify the parents of any student alleged to have experienced sexual harassment and the parents of a student who is alleged to have engaged in conduct that could be sexual harassment with notice in compliance with the “Written Notice” section below.

**5. Supportive Measures**

ILTexas shall offer the parties supportive measures. Supportive measures may include individualized services that are non-punitive, non-disciplinary, and do not unreasonably burden the other party yet are designed to restore or preserve a student’s equal access to education. Supportive measures may include but are not limited to counseling, extensions of deadlines or other class-related adjustments, modifications of class schedules, campus escort services, mutual restrictions on contact between the parties, increased monitoring of certain areas of the campus, and other similar measures. ILTexas must maintain as confidential any supportive measures provided to the parties to the extent this would not impair the ability of ILTexas to provide supportive measures.

**6. Formal Complaint Procedure**

A formal complaint alleging sexual harassment shall be in writing. A formal complaint may be made by the complainant-student, a parent, or legal guardian. In cases where an alleged victim does not file a formal complaint, the Title IX Coordinator may initiate the formal complaint process where warranted (e.g., allegations of sexual assault or abuse, improper relationship between employee and student).

The formal complaint process shall be engaged with all deliberate speed for resolving formal complaints of sexual harassment. ILTexas shall attempt to complete an investigation of a formal complaint within 60 calendar days of receiving a formal complaint. Temporary delays shall be permitted only for good cause; good cause can include but is not limited to law enforcement activities, the absence of a party or witness, the absence of a party’s advisor of choice, or the need to provide language assistance or accommodation of disabilities.

a) Equitability and Objectivity

Both the complainant and the respondent are to be treated equitably in the grievance process. ILTexas must ensure an objective evaluation of all relevant evidence, including inculpatory and exculpatory evidence.

b) Credibility and Presumption of Innocence

Credibility determinations shall not be made on the basis of a person’s status as a complainant, respondent, or witness. The respondent is presumed not responsible, and any finding of responsibility comes only at the conclusion of a grievance process.

c) No Conflicts of Interest

The individuals directly involved in the formal complaint process (Title IX Coordinator or designee, investigator, decision-maker, and facilitator of informal resolution efforts) must not have any bias or conflict of interest. These individuals shall also be trained. The materials used to train

Title IX personnel may not rely on sex stereotypes, must promote impartial investigations and adjudications, and must be posted on ILTexas

d) Standard of Evidence

ILTexas will use the preponderance of the evidence standard for making a determination of responsibility.

e) Privileges

No information protected by a legal privilege, such as the attorney-client privilege or the doctor-patient privilege, can be used during an investigation unless the person holding that privilege has waived it. Neither a party nor ILTexas is allowed to seek, permit questions about, or allow the introduction of evidence that is protected by a recognized privilege. Individuals can always opt to waive their own privileges.

f) Emergency Removals

ILTexas may remove a respondent from ILTexas' education programs or activities on an emergency basis if ILTexas undertakes an individualized safety and risk analysis and determines that an immediate threat, arising from the allegations of sexual harassment, to anyone's physical health or safety justifies removal. Additionally, ILTexas must provide the respondent with notice and an opportunity to challenge the decision immediately following the removal.

ILTexas' ability to initiate an emergency removal does not override or modify the rights of individuals under the Individuals with Disabilities Education Act, Section 504, or the Americans with Disabilities Act.

If the respondent is a ILTexas employee, the employee may be placed on administrative or other school-initiated leave during the investigation in accordance with applicable law.

g) Initial Assessment of Formal Complaint and Potential Dismissal

Upon receipt of a formal complaint, the Title IX Official or designee shall determine whether the allegations, if proven, would constitute sexual harassment as defined by Title IX.

ILTexas must dismiss a formal complaint if the conduct alleged in the formal complaint:

1. Would not constitute sexual harassment, even if proved;
2. Did not occur in ILTexas' education program or activity; or
3. Did not occur against a person in the United States.

ILTexas may dismiss a formal complaint:

1. If the complainant notifies the Title IX Coordinator in writing that he/she wishes to withdraw the formal complaint or any allegations therein;

2. If the respondent is no longer enrolled in or employed by ILTexas; or
3. If circumstances prevent ILTexas from gathering evidence sufficient to reach a determination about the allegations.

If the Title IX Official dismisses a formal complaint or any allegations in it, the Title IX Official shall promptly send written notice of the dismissal and the reasons to the parties. Both parties have the right to appeal a dismissal decision.

Dismissal of a formal complaint does not preclude ILTexas from conducting an investigation under the school's policy concerning on-sexual harassment discrimination or any other policy that may apply to the alleged conduct.

h) Consolidation of Complaints

ILTexas may consolidate formal complaints as to allegations of sexual harassment against more than one respondent, or by more than one complainant against one or more respondents, or by one party against the other party, where the allegations of sexual harassment arise out of the same facts or circumstances.

i) Written Notice

When an investigation of a formal complaint begins, the parties will receive written notice. Included in the notice shall be a copy of this process and ILTexas' policy concerning prohibited sexual harassment. Written notice shall also include:

1. Notice of the allegations of sexual harassment including, to the extent known, the identity of the parties, the conduct allegedly constituting sexual harassment, and the date and location of the alleged incident.
2. A statement that the respondent is presumed to be innocent and that a determination regarding responsibility is made at the conclusion of the formal complaint process.
3. A statement that the parties are entitled to an advisor of their choice who may be a parent/guardian or who may be, but is not required to be, an attorney.
4. A statement that the parties can inspect and review relevant evidence
5. Information from ILTexas code of conduct about making false statements or knowingly submitting false statements during the complaint process.

This written notice must be provided to allow the parties sufficient time to prepare a response before any initial interview.

If, during an investigation, ILTexas District decides to investigate allegations about the complainant or respondent that were not included in the original notice, ILTexas must provide notice of the additional allegations to the parties.

j) Investigators

An investigation of a formal complaint may be conducted by a trained Title IX Official or designee, such as a principal, an assistant principal, a central office administrator, or by a third party designated by ILTexas, such as an attorney. When appropriate, the principal shall be involved in or informed of the investigation.

ILTexas shall provide an equal opportunity for the parties to present witnesses to be interviewed and evidence to be considered, including information from fact and expert witnesses, as well as inculpatory and exculpatory evidence.

ILTexas cannot restrict the ability of a party to discuss the allegations under investigation or to gather and present relevant evidence.

k) Representation

Both parties will have the opportunity to have an advisor of choice accompany them to any meetings throughout the investigation process. A parent/guardian may serve as a student's advisor; a student may also have an advisor in addition to his/her parent present at meetings in the investigation process. However, parents and advisors cannot interfere with interviews. Advisors may only observe.

l) Conducting the Investigation

shall provide written notice of the date, time, location, participants, and purpose of all interviews, or other meetings with sufficient time for the party to prepare.

ILTexas shall provide equal opportunities for the parties and their advisors to inspect and review the evidence obtained as part of its investigation, if the information is directly related to the allegations raised in the formal complaint, so that each party can meaningfully respond to the evidence prior to conclusion of the investigation.

Every party has the right to choose to participate, or not participate, in any part of an investigation. No person shall be forced, threatened, coerced, discriminated against, or retaliated against for choosing not to be part of the grievance process.

The investigation may consist of personal interviews with the person making the report, the complainant, the respondent, and others with knowledge of the circumstances surrounding the allegations. The investigation may also include analysis of other information or documents related to the allegations.

Prior to completing an investigative report, ILTexas will send to each party and the party's advisor, if any, the evidence subject to inspection and review in an electronic format or a hard copy. The parties must have at least 10 days to submit a written response, which the investigator will consider prior to completing the investigative report.

If a response is submitted, the investigator shall consider that response before finalizing the investigative report. The investigative report can then be finalized and provided to the parties.

That report shall be circulated to the parties at least another 10 days before any determination of responsibility.

Before making a determination of responsibility, the parties shall be given an opportunity to submit relevant, written questions to each other. The decision maker may establish a deadline for a party to respond to questions posed by another party. Responses may be verbal or written at the decision-maker's discretion. Parents/guardians may respond in writing for their children. The decision-maker may ask additional questions of the parties and witnesses before making a determination of responsibility.

Questions and evidence about a complainant's prior sexual history are not relevant with two limited exceptions: to prove someone other than the respondent committed the alleged misconduct or to prove consent.

m) Cooperation with Law Enforcement or Regulatory Agencies

If a law enforcement or regulatory agency notifies ILTexas that a criminal or regulatory investigation has been initiated, ILTexas shall confer with the agency to determine if the school's investigation would impede the criminal or regulatory investigation. ILTexas shall proceed with its investigation only to the extent that it does not impede the ongoing criminal or regulatory investigation. After the law enforcement or regulatory agency has finished gathering its evidence, ILTexas shall promptly resume its investigation.

n) Disability Accommodations

ILTexas shall ensure that individuals with disabilities who participate in the school's formal grievance process are appropriately accommodated, including with respect to the use of technology and reliance on visual, auditory, or written modes of communication.

o) Concluding the Investigation

The investigator shall prepare a final written report of the investigation. The report shall not include a determination of whether prohibited conduct occurred but may include recommended findings of fact. The report shall be filed with the Title IX Coordinator and the decision-maker.

p) Written Determination of Responsibility and Notification

Notification of the outcome of the investigation shall be provided to both parties in compliance with FERPA.

q) Decision-maker

The decision-maker shall objectively evaluate the relevant evidence and reach conclusions about whether the respondent is responsible for the alleged sexual harassment. The decision-maker shall



use independent judgment and shall not be the Title IX Coordinator or the person(s) who conducted the investigation.

Decision-makers shall be free from conflicts of interest or bias for or against complainants or respondents and shall have received special training about how to be impartial and how to decide what evidence is relevant. The decision-maker will weigh the relevant evidence and decide whether it meets ILTexas standard of evidence for sexual harassment allegations.

After the evidence has been weighed, the decision-maker shall issue a written decision regarding responsibility. It shall include:

1. Identification of the allegations potentially constituting sexual harassment.
2. A description of the procedural steps taken from receipt of the formal complaint through the determination of responsibility, including notifications to the parties, interviews with parties and witnesses, site visits, methods used to gather other evidence, and hearings held, if any.
3. Findings of fact supporting the determination.
4. Conclusions regarding the application of ILTexas' code of conduct to the facts.
5. A statement of, and rationale for, the result as to each allegation, including a determination regarding responsibility.
6. Any disciplinary sanctions that will be imposed on the respondent, and whether remedies will be provided to the complainant to restore or preserve equal access to ILTexas' education program or activity.
7. A statement of ILTexas' procedures and permissible bases for the complainant and respondent to appeal.

ILTexas shall send the written determination regarding responsibility to the parties simultaneously, along with information about how to appeal the determination.

The Title IX coordinator is responsible for implementing the remedies contained in the written determination regarding responsibility if there is no timely appeal or once the appeal process is completed.

r) Corrective Action/Remedies

ILTexas' remedies are to be designed to restore or preserve equal access to the school's education programs or activities.

Disciplinary consequences for respondents who are students will range from a verbal warning to expulsion, as allowed under the Student Code of Conduct.

Disciplinary consequences for respondents who are employees will range from a verbal warning to termination of employment, as allowed under the school's standards for employee conduct.

Corrective actions may also include training programs for those involved in the complaint, a comprehensive education program for the school community, counseling to the complainant and

the respondent who engaged in prohibited conduct, follow-up inquiries to determine if any new incidents or any instances of retaliation have occurred, involving parents and students in efforts to identify problems and improve the school climate, increasing staff monitoring of areas where prohibited conduct has occurred, and reaffirming ILTexas' policy against discrimination and harassment.

s) Improper Conduct Not Constituting Sexual Harassment

If the investigation reveals improper conduct that did not rise to the level of sexual harassment, ILTexas may take disciplinary action in accordance with the Student Code of Conduct and/or employee standards for conduct, along with any other corrective action reasonably calculated to address the conduct.

t) Confidentiality

To the greatest extent possible, ILTexas shall respect the privacy of the complainant, respondent, and witnesses. Limited disclosures may be necessary to conduct a thorough investigation, comply with applicable law, and to implement supportive measures.

ILTexas shall maintain the identities of parties and witnesses as confidential, unless disclosure of someone's identity is required under other laws or is necessary in order to conduct the grievance process, including the implementation of supportive measures and to comply with the Title IX regulations.

u) Appeal

An appeal must be in writing (on a form provided by ILTexas) and filed with the Title IX Coordinator within 10 calendar days of issuance of the determination of responsibility. Appeals are available on the following bases:

1. A procedural irregularity that affected the outcome of the matter;
2. New evidence that was not reasonably available at the time the determination regarding responsibility or dismissal was made, that could affect the outcome of the matter; or
3. The Title IX Coordinator, investigator(s), or decision-maker(s) had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that affected the outcome of the matter.

A ILTexas official who decides the appeal shall not be the same person who reached the determination regarding responsibility, the investigator, or the Title IX Coordinator.

After considering the parties' written statements, the decision-maker on appeal shall issue a written decision and send it to the parties simultaneously.

ILTexas' determination about whether the respondent is responsible for the sexual harassment allegations becomes final after appeal.

v) Retaliation Prohibited

ILTexas prohibits retaliation by a student or school employee against anyone alleged to have experienced sexual harassment, or any other person who in good faith, makes a report of sexual harassment, serves as a witness, or participates or refuses to participate in an investigation.

Any person who believes he or she has been retaliated against may file a complaint in accordance with the grievance process described in this regulation.

w) False Claim

A student or employee who intentionally makes a false claim or provides a materially false statement shall be subject to appropriate disciplinary action.

**7. Informal Resolution**

ILTexas may offer informal resolution at any time prior to reaching a determination regarding responsibility, except in cases where the respondent is a school employee. Informal resolution may be attempted only if each party enters the process voluntarily. ILTexas will not require informal resolution as a condition of continuing enrollment or employment, the enjoyment of any other right, or a waiver of the right to an investigation and adjudication of formal complaints. ILTexas also may not offer an informal resolution process unless a formal complaint is filed.

ILTexas shall provide a specially trained resolution facilitator who is free from conflicts of interest or bias. All parties shall be provided with notice of the allegations, notice of their rights, information about whether an informal process is confidential, and about withdrawing from the process.

**8. Records Retention**

ILTexas shall retain copies of each sexual harassment allegation, investigation report, and related records for the time period required under the Title IX regulations at 34 C.F.R. Part 106.

**9. Access to Procedures**

Information regarding this regulation shall be included in ILTexas' employee and student handbooks.

## Suggested Employee Handbook Language Updated Title IX Regulations

### Equal Employment Opportunity

International Leadership of Texas (“ILTexas” or the “School”) is an equal opportunity employer and does not discriminate against any employee or applicant for employment because of race, color, religion, gender, sex, national origin, age, disability, military status, genetic information, or any other basis prohibited by law as required by Title VI and Title VII of the Civil Rights Act of 1964, as amended; Title IX of the Education Amendments of 1972; Title I and Title V of the Americans with Disabilities Act of 1990, as amended (“ADA”); the Age Discrimination in Employment Act of 1967, as amended (“ADEA”); Section 504 of the Rehabilitation Act of 1973, as amended; the Genetic Information Nondiscrimination Act of 2008 (“GINA”); and any other legally-protected classification or status protected by federal, state, or local law. Additionally, ILTexas does not discriminate against an employee or applicant who acts to oppose such discrimination or participates in the investigation of a complaint related to an alleged discriminatory employment practice. Employment decisions will be made on the basis of each individual’s job qualifications, experience, and abilities and in accordance with applicable state and federal law.

Employees can raise concerns and make reports without fear of reprisal. Employees with questions or concerns relating to equal employment opportunity, including discrimination and disability accommodations, are encouraged to bring these issues to the attention of a ILTexas administrator, or one of the compliance coordinators designated below.

As required by Title IX, ILTexas does not (and is required not to) discriminate on the basis of sex in its educational programs or activities. This non-discrimination requirement applies to admission to and employment with ILTexas. Inquiries into issues related to Title IX may be referred to ILTexas Title IX Coordinator (identified below), to the Assistant Secretary for Civil Rights of the Department of Education, or both.

ILTexas has designated the following person as the Title IX Coordinator, who is responsible for receiving and overseeing investigations of alleged discrimination on the basis of sex, including sexual harassment: Victor Cathey, Executive Director of Athletics and Physical Fitness, 1820 N. Glenville Dr. Suite 100, Richardson, TX 75081. 972-479-9078, [vcathey@iltexas.org](mailto:vcathey@iltexas.org)

ILTexas has designated the following person as the ADA / Section 504 Coordinator, who is responsible for receiving and investigating complaints of alleged discrimination or harassment on the basis of disability: Mary Albritton, Director of Counseling, 1820 N. Glenville Dr. Suite 100, Richardson, TX 75081. 972-479-9078, [malbritton@iltexas.org](mailto:malbritton@iltexas.org)

ILTexas has designated the following person as the Title VII/ADEA Coordinator, who is responsible for receiving and investigating complaints of alleged discrimination or harassment on the basis race, color, religion, gender, sex, national origin, or age: Regina Jones, Chief Equity

Officer, 1820 N. Glenville Dr. Suite 100, Richardson, TX 75081. 972-479-9078, [rjones@iltexas.org](mailto:rjones@iltexas.org)

All other complaints regarding equal employment opportunity may be directed to: Regina Jones, Chief Equity Officer, 1820 N. Glenville Dr. Suite 100, Richardson, TX 75081. 972-479-9078, [rjones@iltexas.org](mailto:rjones@iltexas.org)

## Prohibition of Discrimination, Harassment, and Retaliation

ILTexas prohibits discrimination, including harassment, of a co-worker based upon race, color, national origin, religion, sex or gender, disability, veteran status, age, genetic information, or any other basis prohibited by law. While acting in the course of their employment, employees shall not engage in prohibited discrimination or harassment of other persons including Board members, vendors, contractors, volunteers, or parents. Discrimination or harassment become unlawful where:

1. Enduring the offensive conduct becomes a condition of continued employment; or
2. The conduct is severe or pervasive enough to create a work environment that a reasonable person would consider intimidating, hostile, or abusive.

Petty slights, annoyances, and isolated incidents (unless extremely serious) will not rise to the level of prohibited discrimination or harassment. To be unlawful, the conduct must create a work environment that would be intimidating, hostile, or offensive to reasonable people.

Prohibited and offensive conduct can include, but is not limited to, offensive jokes, slurs, epithets, or name-calling; physical assaults or threats; intimidation; ridicule or mockery; insults or put-downs; offensive objects or pictures; and/or interference with work performance. Harassment can occur in a variety of circumstances, including but not limited to the following:

1. The harasser can be the victim’s supervisor, a supervisor in another area, an agent of the school, a co-worker, or a non-employee.
2. The victim does not have to be the person harassed, but can be anyone affected by the offensive conduct.
3. Unlawful harassment may occur without economic injury to, or discharge of, the victim.

### ***Retaliation***

ILTexas strictly prohibits retaliation against a student, parent, or an employee who in good faith reports or complains about discrimination, harassment, or other prohibited conduct, or who serves as a witness or otherwise participates in an investigation. Employees who take part in any retaliatory action will be subject to discipline, up to and including termination. Retaliation may include, but is not limited to: demotion, denial of promotion, poor performance appraisals, transfer, and assignment of demeaning tasks or taking any kind of adverse actions against a person who

complains about discrimination or harassment.

An employee who intentionally makes a false claim, offers false statements, or refuses to cooperate with a ILTexas investigation regarding harassment or discrimination is subject to appropriate discipline, up to and including termination.

### ***Reporting Procedures***

An employee who believes that he or she has experienced prohibited discrimination or harassment, retaliation, or believes that another employee has experienced such prohibited conduct, should follow the “Employee Complaints and Grievances Regarding Harassment and Discrimination” section of the Employee Handbook. The process for making formal complaints regarding sexual harassment is discussed in the “Sexual Harassment Prohibited” section of the Employee Handbook.

Reports of prohibited discrimination or harassment shall be made as soon as possible after the alleged act or knowledge of the alleged act. Failure to promptly report may impair ILTexas ability to investigate and address the prohibited conduct.

Any supervisor who receives a report of prohibited discrimination or harassment shall immediately notify the appropriate Compliance Coordinator listed above, and take any other steps required by ILTexas policy.

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## **Sexual Harassment Prohibited**

ILTexas prohibits discrimination on the basis of sex, including sexual harassment, by an employee, volunteer, or student.

Sexual harassment means conduct on the basis of sex that satisfies one or more of the following:

1. A school employee conditioning the provision of aid, benefit, or service of ILTexas on an individual’s participation in unwelcome sexual conduct;
2. Unwelcome conduct determined by a reasonable person to be so severe, pervasive, and objectively offensive that it effectively denies a person equal access to ILTexas education program or activity; or
3. Sexual assault, dating violence, domestic violence, or stalking (as those offenses are defined in the Clery Act, 20 U.S.C. § 1092(f), and the Violence Against Women Act, 34 U.S.C. § 12291(a)).

Examples of sexual harassment may include, but are not limited to, touching private body parts or coercing physical contact that is sexual in nature; sexual advances; jokes or conversations of a sexual nature; sexually-motivated physical, verbal, or nonverbal conduct; or other sexually motivated conduct, communications, or contact.

Romantic or inappropriate social relationships between students and school employees are prohibited. Any sexual relationship between a student and a school employee is always prohibited, even if consensual.

***General Definitions***

A “complainant” means an individual who is alleged to be the victim of conduct that could constitute sexual harassment.

A “respondent” means an individual who is reported to be the perpetrator of conduct that could constitute sexual harassment.

A “formal complaint” means a document filed by a complainant or signed by the Title IX Coordinator alleging sexual harassment against a respondent and requesting that ILTexas investigate the allegation of sexual harassment.

“Supportive measures” means non-disciplinary, non-punitive individualized services offered appropriate and without fee or charge to the complainant or the respondent before or after the filing of a formal complaint or where no formal complaint has been filed. Such measures are designed to restore or preserve equal access to ILTexas educational program or activity without unreasonably burdening either party, including measures designed to protect the safety of all parties or ILTexas educational environment, or deter sexual harassment. Examples of supportive measures include, but are not limited to, counseling, extensions of deadlines or other course-related adjustments, modifications of class schedules, mutual restrictions on contact between the parties, and other similar measures.

***Reporting Sexual Harassment***

Any person may report sex discrimination, including sexual harassment (whether or not the person reporting is the person alleged to be the victim of conduct that could constitute sex discrimination or sexual harassment), in person, by mail, by telephone, or by email, using the contact information listed for the Title IX Coordinator in the Employee Handbook, or by any other means that results in the Title IX Coordinator receiving the person’s verbal or written report. Such a report may be made at any time, including during non-business hours, by using the telephone number or email address, or by mail to the office address, listed for the Title IX Coordinator.

ILTexas response to a report of sexual harassment must treat complainants and respondents equitably by offering supportive measures and by following a grievance process before the imposition of any disciplinary sanctions or other actions that are not supportive measures against a respondent.

After a report of sexual harassment has been made, the Title IX Coordinator must promptly contact the complainant to discuss the availability of supportive measures, consider the complainant’s wishes with respect to supportive measures, inform the complainant of the availability of supportive measures with or without the filing of a formal complaint, and explain to the complainant the process for filing a formal complaint.

### ***Notice of Allegations***

Upon receipt of a formal complaint, ILTexas must provide the following written notice to the parties who are known:

- Notice of ILTexas grievance process, including any informal resolution process.
- Notice of the allegations of sexual harassment, including, to the extent known, the identity of the parties, the conduct allegedly constituting sexual harassment, and the date and location of the alleged incident.
- Notice that the respondent is presumed not responsible for the alleged conduct and that a determination regarding responsibility is made known at the conclusion of the grievance process.
- Notice that the parties may have an advisor of their choice, who may be, but is not required to be, an attorney.
- Notice that the parties may inspect and review evidence related to the complaint.
- Notice that ILTexas prohibits knowingly making false statements or knowingly submitting false information during the grievance process.

If, during an investigation, ILTexas decides to investigate allegations about the complaint or respondent that are not included in the initial notice of the complaint, ILTexas must provide notice of the additional allegations to the parties whose identities are known.

### ***Grievance Process***

At the time of filing a formal complaint, a complainant must be participating in or attempting to participate in the education program or activity of ILTexas.

The following guidelines apply when ILTexas receives a formal complaint of sexual harassment. This process is designed to incorporate due process, principles, treat all parties fairly, and to assist ILTexas reach reliable responsibility determinations.

- ILTexas will require an objective evaluation of all relevant evidence – including both inculpatory and exculpatory evidence – and credibility determinations may not be based on a person’s status as a complainant, respondent, or witness.
- Any individual designated by ILTexas as a Title IX Coordinator, investigator, decision-maker, or to facilitate an informal resolution process must not have a conflict of interest or bias for or against complainants or respondents generally or an individual complainant or responsible. ILTexas will ensure that Title IX Coordinators, investigators, decision-makers, and anyone who facilitates an informal resolution process receive appropriate training related to the requirements of Title IX and ILTexas sexual harassment policy.
- ILTexas recognizes a presumption that the respondent is not responsible for the alleged conduct until a determination regarding responsibility is made at the conclusion of the complaint process.
- ILTexas shall attempt to complete an investigation of reported sexual harassment within 60 calendar days of receiving a complaint. However, the investigation process may be delayed or extended for a limited time for good cause with written notice to the complainant and the respondent of the delay or extension. Good cause may include considerations such as absence of a party, a party’s advisor, or a witness; concurrent law enforcement activity;



or the need for language assistance or accommodation of disabilities.

- Students found to have engaged in sexual harassment are subject to disciplinary action as outlined in the School’s Student Code of Conduct. Employees found to have engaged in sexual harassment are subject to disciplinary action as outlined in the Employee Handbook.
- ILTexas shall employ the preponderance of the evidence standard to determine responsibility when reviewing formal complaints.
- ILTexas may not require, allow, rely upon, or otherwise use questions of evidence that constitute, or seek disclosure, of information protected under a legally recognized privilege, unless the person holding such privilege has waived the privilege.

***Consolidating Formal Complaints***

ILTexas may consolidate formal complaints as to allegations of sexual harassment against more than one respondent, or by more than one complainant against one or more respondents, or by one party against the other party, where the allegations of sexual harassment arise out of the same facts or circumstances.

***Dismissal of Formal Complaints***

ILTexas must investigate the allegations in a formal complaint.

ILTexas must dismiss a formal complaint if the conduct alleged in the formal complaint:

- Would not constitute sexual harassment, even if proved;
- Did not occur in ILTexas education program or activity; or
- Did not occur against a person in the United States.

ILTexas may dismiss a formal complaint or any allegations therein if, at any time during the investigation:

- A complainant notifies the Title IX Coordinator in writing that the complainant would like to withdraw the formal complaint or any allegations therein;
- The respondent is no longer enrolled or employed by ILTexas; or
- Specific circumstances prevent ILTexas from gathering evidence sufficient to reach a determination as to the formal complaint or allegations therein.

Upon a dismissal, ILTexas must promptly send simultaneous written notice to the parties of the dismissal and the reason(s) for the dismissal. Dismissal of a formal complaint does not preclude ILTexas from taking appropriate action under the Student Code of Conduct, the Employee Handbook, and/or any other school policy that may apply to the alleged conduct.

***Investigating Formal Complaints***

The following guidelines apply during the investigation of a formal complaint and throughout the grievance process.

- ILTexas will ensure the burden of proof and the burden of gathering evidence sufficient to reach a determination regarding responsibility rests on ILTexas and not on the parties.
- ILTexas cannot access, consider, disclose, or otherwise use a party’s records that are made

or maintained by a physician, psychiatrist, psychologist, or other recognized professional or paraprofessional acting in the professional's or paraprofessional's capacity, or assisting in that capacity, and which are made and maintained in connection with the provision of treatment to the party, unless ILTexas receives that party's voluntary, written consent to do so.

- ILTexas will provide an equal opportunity for the parties to present witnesses, including fact and expert witnesses, and other inculpatory and exculpatory evidence.
- ILTexas will not restrict the ability of either party to discuss the allegations under investigation or to gather and present relevant evidence.
- ILTexas will provide the parties with the same opportunities to have others present during any grievance proceeding, including the opportunity to be accompanied to any related meeting or proceeding by the advisory of their choice, and not limit the choice or presence of an advisor for either the complainant or respondent in any meeting or grievance proceeding. ILTexas may establish restrictions regarding the extent to which the advisor may participate in the proceedings, as long as the restrictions apply equally to both parties.
- ILTexas will provide to a party whose participation is invited or expected written notice of the date, time, location, participants, and purpose of all investigative interviews or other meetings with sufficient time for the party to prepare to participate.
- ILTexas will provide both parties an equal opportunity to inspect and review any evidence obtained as part of the investigation that is directly related to the allegations raised in a formal complaint, including the evidence upon which the recipient does not intend to rely in reaching a determination regarding responsibility and inculpatory or exculpatory evidence whether obtained from a party or other source, so that each party can meaningfully respond to the evidence prior to conclusion of the investigation.
- Prior to completing an investigative report, ILTexas must send to each party and the party's advisor, if any, the evidence subject to inspection and review in an electronic format or a hard copy, and the parties must have at least 10 calendar days to submit a written response, which the investigator will consider prior to completing the investigative report.
- ILTexas must create an investigative report that fairly summarizes relevant evidence and, at least 10 calendar days prior to a determination regarding responsibility, send to each party and the party's advisor, if any, the investigative report in an electronic format or a hard copy, for review and written response.
- After sending the investigative report to the parties and before reaching a determination of responsibility, the decision-maker(s) must afford each party the opportunity to submit written relevant questions that a party wants asked of any witness, provide each party with the answers, and allow for additional, limited follow-up questions from each party. Questions and evidence about the complainant's sexual predisposition or prior sexual behavior are not relevant, unless such questions and evidence about the complainant's prior sexual behavior are offered to prove that someone other than the respondent committed the conduct alleged by the complainant, or if the questions and evidence concern specific incidents of the complainant's prior sexual behavior with respect to the respondent and are offered to prove consent. The decision-maker(s) must explain to the party proposing the questions any decision to exclude a question as not relevant.

### ***Determination Regarding Responsibility***

The decision-maker(s) making a determination regarding responsibility cannot be the same

person(s) as the Title IX Coordinator or the investigator(s). The decision-maker(s) must review the investigation report and make a written determination, based on the preponderance of the evidence standard, regarding responsibility. The written determination must include:

- Identification of the allegations potentially constituting sexual harassment;
- A description of the procedural steps taken from receipt of the formal complaint through the determination, including any notifications to the parties, interviews with parties and witnesses, site visits, or methods used to gather other evidence;
- Findings of fact supporting the determination;
- Conclusions regarding application of ILTexas Code of Conduct, Employee Handbook, or other non-discrimination policies to the facts;
- A statement of, and rationale for, the result as to each allegation, including a determination regarding responsibility, any disciplinary sanctions imposed on the respondent, and whether remedies designed to restore or preserve equal access to ILTexas education program or activities will be provided to the complainant; and
- ILTexas procedures and permissible bases for the complainant and respondent to appeal.

ILTexas must provide the written determination to the parties simultaneously. The determination becomes final either on the date ILTexas provides the parties with the written determination of the result of the appeal, if an appeal is filed, or if an appeal is not filed, the date on which an appeal would no longer be considered timely.

The Title IX Coordinator is responsible for effective implementation of any remedies.

### ***Appeals***

ILTexas will offer both parties an appeal from a determination regarding responsibility, and from ILTexas dismissal of a formal complaint or any allegations therein, on the following bases:

- Procedural irregularity that affected the outcome of the matter;
- New evidence that was not reasonably available at the time the determination regarding responsibility or dismissal was made, that could affect the outcome of the matter; and
- The Title IX Coordinator, investigator(s), or decision-maker(s) had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that affected the outcome of the matter.

As to appeals, ILTexas will ensure that the decision-maker(s) for the appeal is not the same person as the decision-maker(s) that reached the determination regarding responsibility or dismissal, or the investigator(s), or the Title IX Coordinator. ILTexas will provide both parties a reasonable equal opportunity to submit a written statement in support of, or challenging, the outcome.

The decision-maker(s) for the appeal will issue a written decision, based on the preponderance of the evidence standard, describing the result of the appeal and the rationale for the result, and provide the written decision simultaneously to both parties.

A party who is dissatisfied with the appeal decision may file an appeal to the Board of Directors through the process outlined in ILTexas grievance procedures.

***Emergency Removals***

ILTexas is able to remove a respondent from ILTexas education program on an emergency basis, provided that ILTexas undertakes an individualized safety and risk analysis, determines that an immediate threat to the physical health or safety of any student or other individual arising from the allegations of sexual harassment justifies removal, and provides the respondent with notice and an opportunity to challenge the decision immediately following the removal. ILTexas ability to do so may not be construed to modify any rights under the Individuals with Disabilities Education Act, Section 504, or the Americans with Disabilities Act.

***Informal Resolution***

At any time prior to reaching a determination regarding responsibility, ILTexas may facilitate an informal resolution process, such as mediation, that does not involve a full investigation and adjudication. However, ILTexas may not require as a condition of enrollment or continuing enrollment, or employment or continued employment, or enjoyment of any other right, waiver of the right to an investigation and adjudication of formal complaints. Additionally, ILTexas may not require the parties to participate in an informal process and may not offer an informal resolution process unless a formal complaint is filed.

Prior to facilitating an informal resolution process, ILTexas must:

- Provide to the parties a written notice disclosing the allegations and the requirements of the informal resolution process including the circumstances under which it precludes the parties from resuming a formal complaint arising from the same allegations. The notice must also inform that, at any time prior to agreeing to a resolution, any party has the right to withdraw from the informal resolution process and resume the grievance process with respect to the formal complaint, as well as of any consequence resulting from participating in the informal resolution process, including the records that will be maintained or could be shared.
- Obtain the parties' voluntary, written consent to the informal resolution process.

ILTexas may not offer or facilitate an informal resolution process to resolve allegations that an employee sexually harassed a student.

***Retaliation Prohibited***

Neither ILTexas nor any other person may intimidate, threaten, coerce, or discriminate against any individual for the purpose of interfering with any right or privilege secured by Title IX, or because the individual has made a report or complaint, testified, assisted, or participated or refused to participate in any manner in an investigation or proceeding under this policy.

Examples of retaliation may include, but are not limited to, intimidation, threats, coercion, or discrimination.

Complaints alleging retaliation may be filed according to the grievance procedure described above.

***Confidentiality***

ILTexas must keep confidential the identity of any individual who has made a report or complaint of sex discrimination, including any individual who has made a report or filed a formal complaint of sexual harassment, any complainant, any individual who has been reported to be the perpetrator of sex discrimination, any respondent, and any witness, except as may be permitted by FERPA or as required by law, or for purposes related to the conduct of any investigation, hearing, or judicial proceeding arising under the Title IX regulations.

***Non-Sexual Harassment Sex Discrimination***

The formal complaint investigation and resolution process outlined above applies only to formal complaints alleging sexual harassment as defined by Title IX, but not to complaints alleging sex discrimination that do not constitute sexual harassment. Complaints of non-sexual harassment sex discrimination may be filed with the Title IX Coordinator and will be handled under the process described in the “Employee Complaints and Grievances Regarding Harassment and Discrimination” portion of the Employee Handbook.

**Employee Complaints and Grievances Regarding Harassment and Discrimination**

**\*\*NOTE\*\*** ILTexas process for making formal complaints regarding sexual harassment is discussed in the “Sexual Harassment Prohibited” portion of the Employee Handbook.

ILTexas takes allegations of harassment and discrimination very seriously and intends to investigate all official complaints. ILTexas will take appropriate actions for all substantiated allegations. Employees who believe they are being harassed or discriminated against are requested to take the following actions:

- In the event you feel you are a victim of harassment, you should contact your immediate supervisor and/or the designated Compliance Coordinator immediately. In the event your immediate supervisor is the alleged harasser, you should contact the next level of management immediately. Complaints against the designated compliance coordinator may be submitted to the Superintendent.
- Any employees who are uncomfortable with face-to-face interaction may write down their complaints in a memo, and submit the memo to their immediate supervisor and/or the designated Compliance Coordinator.
- Any ILTexas employee who receives a report of suspected harassment or discrimination is expected to immediately contact the designated Compliance Coordinator.
- Complaints will be handled in a timely manner.

Reports of prohibited discrimination or harassment shall be made as soon as possible after the alleged act or knowledge of the alleged act. A failure to promptly report may impair the school’s ability to investigate and address the alleged prohibited conduct.

Any supervisor who receives a report of discrimination or harassment shall immediately notify the appropriate Compliance Coordinator, and take any other steps required by ILTexas.

After receiving a report, the Compliance Coordinator shall determine whether the allegations, if proven, would constitute prohibited discrimination or harassment. If so, ILTexas shall immediately authorize or undertake an investigation. If appropriate, ILTexas shall promptly take interim action calculated to prevent prohibited conduct during the course of an investigation.

The school's investigation may be conducted by the Compliance Coordinator or designee, or by a third party designated by ILTexas, such as an attorney. When appropriate, the Principal or supervisor shall be involved in or informed of the investigation.

The investigation may consist of personal interviews with the person making the report, the person against whom the report is filed, and others with knowledge of the circumstances surrounding the allegations. The investigation may also include analysis of other information or documents related to the allegations.

After completing an investigation, the investigator shall prepare a written report summarizing the outcome of the investigation.

If the results of an investigation indicate that prohibited conduct occurred, ILTexas shall promptly respond by taking appropriate disciplinary or corrective action reasonably calculated to address the conduct and to end any harassment and to deter future harassment. ILTexas may also take action based on the results of an investigation, even if the conduct did not rise to the level of prohibited or unlawful conduct.

To the greatest extent possible, ILTexas shall respect the privacy of the complainant, persons against whom a report is filed, and witnesses. The purpose of this provision is to maintain impartiality and confidentiality to the extent possible. Both the reporting individual, victim and the accused have equal privacy rights under the law, and ILTexas must respond accordingly. However, limited disclosures may be necessary in order to conduct a thorough investigation and comply with applicable law.

An employee who is dissatisfied with the outcome of the investigation may appeal through the School's general employee grievance process, beginning at the level of Superintendent review.

ILTexas prohibits retaliation against an employee who, in good faith, makes a claim alleging to have experienced discrimination or harassment, or another employee who, in good faith, makes a report, serves as a witness, or otherwise participates in an investigation. Examples of retaliation may include termination, refusal to hire, demotion, and denial of promotion. Retaliation may also include threats, unjustified negative evaluations, unjustified negative references, or increased surveillance.

In addition to using the school's complaint process, an employee may file a formal complaint with the Equal Employment Opportunity Commission ("EEOC") or Texas Workforce Commission ("TWC"). Additional information may be found by visiting

<http://www.eeoc.gov/employees/charge.cfm>.

**CONSENT AGENDA ITEM 2**  
**Child Nutrition Code of Conduct**





# **International Leadership of Texas Child Nutrition Food Services Department**

## **Code of Conduct**

**Effective September 1, 2020**

This Code of Conduct has been created to establish and maintain effective oversight over the International Leadership of Texas Food Services Department's financial management system that provides reasonable assurance that the International Leadership of Texas Food Services Department is managing the program in compliance with all federal, state, and local regulations and terms and conditions of the program award and;

To establish and maintain effective oversight over those definitive actions related to the procurement process, establish standards of ethical conduct and integrity for procurement actions, and provide full and open competition in all procurement actions.

**1280 N Glenville Dr.  
Richardson, TX 75081**

**972-479-9078**

## **International Leadership of Texas – Child Nutrition Food Service Department Code of Conduct**

As representatives of the International Leadership of Texas Food Services Department, all employees are expected to conduct themselves in a professional and ethical manner, maintaining high standards of integrity and the use of good judgment. Employees are expected to be principled in their business interactions and act in good faith with individuals both inside and outside the International Leadership of Texas.

The following Code of conduct shall govern the performance, behavior and actions of the International Leadership of Texas Food Services Department, including employees, directors, officials, or agents who are engaged in any aspect of procurement, including – but not limited to – purchasing goods and services; awarding contracts; or the administration and supervision of contracts.

### **Code of Conduct**

- No employee, directors or agent of the International Leadership of Texas Food Services Department shall participate in the selection, award or administration of a bid or contract supported by federal funds if a conflict of interest is real or apparent to a reasonable person.
- Conflicts of interest may arise when any employee, directors or agent of the International Leadership of Texas Food Services Department has a financial, family or any other beneficial interest in the vendor selected or considered for an award.
- No employee, directors or agent of the International Leadership of Texas Food Services Department shall award contracts to, or show favoritism toward a member of his/her immediate family, spouse's family or to any company, vendor or concern who either employs or has any relationship to a family member; or award a contract or bid which violates the spirit or intent of Federal, State and local procurement laws and policies established to maximize free and open competition among qualified vendors. Those circumstances where interests, financial or otherwise, are not substantial or are within the limits of applicable Federal, State and local laws and the policies and procedures of the International Leadership of Texas, the Superintendent's Cabinet shall determine whether the conflict is material under the circumstances.
- The International Leadership of Texas Food Services Department employees, directors, and agents will not solicit gifts, including but not limited to travel packages or other incentives, and/or donations from prospective contactors. However, incentive language may be included as part of the competitive procurement (formal bid and request for proposal) solicitation language to acquire the most favorable terms for the operation and benefit of the non-profit food service account. Such incentives include but are not limited to volume rebates, timely payment discounts, program promotion assistance, upfront savings, etc...

### **Conflicts of Interest**

International Leadership of Texas employees must not solicit or accept gratuities, favors, or anything of value to perform improper financial actions, including actions related to procuring contractors or parties to subcontracts. When this occurs, there is a conflict of interest.

A conflict of interest is *any action that allows a person to benefit at the expense of the public interest or the expense of his or her employer*. A conflict of interest may be real or apparent, i.e., a conflict of interest does not have to be acted upon to be considered a conflict of interest.

A real or apparent conflict of interest occurs in situations such as the following:

- International Leadership of Texas employee has a financial or other interest in a business being considered for a contract.
- International Leadership of Texas Food Services employee receives a tangible personal benefit from a business being considered for a contract.
- International Leadership of Texas Food Services employee has a personal relationship or friendship with a business being considered for a contract.
- International Leadership of Texas Food Services employee is employed by, about to be employed by, or is seeking employment from a business being considered for a contract.

International Leadership of Texas Food Services will consult with their attorney or legal counsel if there is a question about whether a specific situation is a conflict of interest.

International Leadership of Texas Food Services' "nominal value" may be no more than the value of a cup of coffee. Acceptance of such offerings is highly recommended against, but International Leadership of Texas Food Services is aware that sometimes such offerings are unavoidable. It is required that all vendors be informed by the district staff that such offerings are not allowed.

International Leadership of Texas Food Services considers all "tangible benefits," as defined below but not limited to, to be a conflict of interest.

- Offering a special item at a much lower price than the price structure for a current contract.
- Offering an item not presently used by the CE at a special price that is below market value.
- Offering an incentive, such as equipment or other prizes for purchasing items.
- Allowing staff to make purchases from a CE-procured contract.

### **Incentives, Gratuities, or Kickbacks**

In accordance with the State of Texas Department of Agriculture (TDA) "Administrative Review Manual" (ARM) Section 16, 16.18, International Leadership of Texas Food Services Department employees; officials; agents acting on the International Leadership of Texas Food Services Department behalf; any

member of the immediate family of the International Leadership of Texas Food Services Department employee, officer, or agent acting on the International Leadership of Texas Food Services Department behalf; or business partner of the employee, officer, or agent acting on International Leadership of Texas Food Services Department behalf cannot accept anything of value from a vendor. Incentive, gratuities, or kickbacks include, but are not limited to, personal gifts or gratuities that may be construed to have been given to influence the purchasing process.

Although such practices may be accepted in the private sector, giving and receiving gifts in the public sector may constitute a violation of law. Gift to a Public Servant is a Class A misdemeanor offense if the recipient is a government employee who exercises some influence in the purchasing process of the governmental body.

An International Leadership of Texas Food Services Department employee or former employee must not knowingly use confidential SNP information for the actual or anticipated personal benefit or benefit for any person or entity.

International Leadership of Texas will apply disciplinary actions (as listed below) for violations of above stated standards by International Leadership of Texas Food Services Department employees, officers, or agents acting on the International Leadership of Texas Food Services Department behalf.

International Leadership of Texas will apply the following disciplinary actions:

1. 1<sup>st</sup> Offense: Documented “verbal” reprimand and review Code of Conduct. Two district staff will be present and sign document as witnesses.
2. 2<sup>nd</sup> Offense: Written reprimand. Two district staff will be present and sign document as witnesses.
3. 3<sup>rd</sup> Offense: Termination.

International Leadership of Texas Food Services Department will provide guidance to each employee, officer, or agent acting on the International Leadership of Texas Food Services Department’s behalf at the time of hire on how to avoid undue influence. International Leadership of Texas Food Services Department will offer training and provide all employees, officers, and agents acting on behalf of International Leadership of Texas Food Services Department a copy of International Leadership of Texas’ Employee Manual that addresses professional and ethical standards.

International Leadership of Texas Food Services Department requires any employee, officer, or agent acting on behalf of International Leadership of Texas Food Services Department to disclose in writing any possible situations where there is an appearance of incentives, gratuities, or kickbacks being received.

### **Benefits Received**

International Leadership of Texas Food Services Department employees; officials; agents acting on the International Leadership of Texas Food Services Department behalf; any member of the immediate family of the International Leadership of Texas Food Services Department employee, officer, or agent acting on the International Leadership of Texas Food Services Department’s behalf; or business partner of the International Leadership of Texas Food Services Department employee, officer, or agent acting on

International Leadership of Texas Food Services Department's behalf must not solicit or accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts.

When incentives are offered by the contractor and accepted by an individual, the incentive must become the property of International Leadership of Texas Food Services Department. Under no condition can the incentive become the property of an individual. The

International Leadership of Texas Food Services Department use the following written procedures on how it will avoid unallowable practices based on benefits received:

1. International Leadership of Texas Food Service employee failure to disclose gifts pursuant in the Code of Conduct policy could result in adverse personnel action against the employee.

### **Conflicts of Interest, Other Individuals or Entities**

International Leadership of Texas defines "other" as the following but not limited to:

- Agent
- Business
- Consultant
- Contractor
- Cooperative
- Distributor
- Food Processor
- Food Service Management Company (FSMC)
- For Profit Organization
- Nonprofit Organization
- Third party
- Vendor

International Leadership of Texas will communicate its expectations and applicable procedures related to program integrity to individuals and entities acting on International Leadership of Texas' behalf. International Leadership of Texas will review all solicitations, agreements, contracts, and other communications prepared on their behalf to ensure compliance with all Federal and State requirements and regulations.

### **Certification Regarding Lobbying**

Lobbying certification requirements are applicable to grants, sub-grants, cooperative agreements, and contracts exceeding \$100,000 in federal funds.

International Leadership of Texas Food Services Department uses the following procedures

1. **Documentation:** International Leadership of Texas Food Services Department will take actions to ensure that the proper documentation is prepared, shared as required, and retained.

2. **Use of Funds:** International Leadership of Texas Food Services Department requires that federal funds must not be paid by or behalf of the International Leadership of Texas Food Services Department to any person influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of a Federal contract, the making of a Federal grant, the making of a Federal loan, the entering into a cooperative agreement, and the extension, continuation, renewal, amendment, or modification of a Federal contract, grant, loan, or cooperative agreement.

**Debarment and Suspension**

International Leadership of Texas Food Services and their subcontractors must not make or permit any award, sub-award, sub-grant, or contract with an individual or entity that is debarred or suspended or is otherwise excluded from or ineligible for participation in federal assistance programs, per the TDA Administrative Review Manual (ARM), Section 16.20.

- International Leadership of Texas Food Services Management Department will include the following debarment and suspension certification in every written agreement with subcontractors:  
*“{name of subcontracting organization } certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participating in this Agreement by any federal department or agency or by the State of Texas. {name of subcontracting organization} shall immediately provide written notice to International Leadership of Texas Food Services Management Department if at any time the {name of subcontracting organization} learns that this certification was erroneous when submitted or has become erroneous by reason of changed circumstances. International Leadership of Texas may rely upon a certification of a subcontractor that it is not debarred, suspended, ineligible, or voluntarily excluded from the covered contract, unless it knows that the certification is erroneous.*
- International Leadership of Texas Food Service Management Department will require the subcontractor to sign and submit the TDA form entitled “Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion for Covered Contracts (H2048)12” and maintain the signed form with its contract record.
- International Leadership of Texas Food Service Management Department will print the page from the System for Award Management (SAM) which indicates the subcontractor is not presently debarred or otherwise excluded from participation in the contract by any federal department or agency or by the State of Texas and will maintain that document on file with the contract documents. The System for Award Management can be accessed at [www.sam.gov/portal/SAM/#1](http://www.sam.gov/portal/SAM/#1)

**Staff Purchase of Items on Awarded Contracts**

International Leadership of Texas Food Services Management Department does not allow any employee, officer or agent acting on behalf of International Leadership of Texas Food Services Management Department to take advantage of International Leadership of Texas Food Services Management Department’s procurement by purchasing off an awarded contract.

Per the ARM, Section 16.22, Confidentiality and Program Integrity, this type of activity as actually accepting the cash difference between the bid or discount price and the amount the individual would have paid for the item in the regular retail market. This is a financial incentive. When an individual pays for the purchase, the payment does not remove the financial incentive. Even if the contractor were to charge retail price, the individual would still be receiving the convenience of a personal delivery and would be accepting a favor from the contractor—therefore, this is an unallowable practice.

**Contracting with Persons and Companies for Assistance in Developing a Solicitation**

Per the ARM, Section 16.22, Confidentiality and Program Integrity, when acquiring goods and services, contracting entities (CEs) may contract with agents or companies that provide technical information in drafting procurement specifications and/or technical requirements. This provision is intended to encourage program administrators to obtain information from as many sources as possible to assist them in drafting procurement documents.

- **Potential Offerors or Interested Parties Involved in Developing a Solicitation**  
International Leadership of Texas Food Services Management Department will not accept a contractor or other interested party’s offer if the contractor or other interested party assisted with or drafted the procurement specifications and/or technical requirements, procedures, or documents.

**Food Taken From Schools**

International Leadership of Texas Food Service Management Department does not allow any employee, officer, or agent acting on behalf of the International Leadership of Texas Food Service Management Department to take food or leftover food (including milk) from the premises for personal use, personal gain, or benefit to another person or entity.

**Reporting of Fraud, Bribery, and Gratuity Violations**

International Leadership of Texas will report, in writing to TDA, all violations of federal criminal law – fraud, bribery, or gratuity.

*The non-Federal entity or applicant for a Federal award must disclose, in a timely manner, in writing to the Federal awarding agency or pass-through entity all violations of Federal criminal law involving fraud, bribery, or gratuity violations potentially affecting the Federal award. Failure to make required disclosures can result in any of the remedies described in § 200.338 Remedies for noncompliance, including suspension or debarment. (2 CFR 200.113; 31 U.S.C. 3321).*



*International Leadership of Texas defines fraud as:*

*Whoever embezzles, willfully misapplies, steals or obtains by fraud any funds, assets or property provided under the National School Lunch Program and/or School Breakfast Program [and/or Special Milk Program] whether received directly or indirectly, shall, if such funds, assets or property are of a value of \$100 or more, be fined no more than \$25,000 or imprisoned not more than 5 years or both; or if such funds, assets or property are of a value of less than \$100, be fined not more than \$1,000 or imprisoned not more than 1 year or both. Whoever receives, conceals or retains for personal use or gain, funds, assets or property provided under the National School Lunch Program and/or School Breakfast Program, whether received directly or indirectly, knowing such funds, assets or property have been embezzled, willfully misapplied, stolen or obtained by fraud, shall be subject to the same penalties.*

**CONSENT AGENDA ITEM 3**  
**Revised Data Quality Manual**

# DATA QUALITY MANUAL

## 2020-2021



International Leadership of Texas  
1820 North Glenville Dr • Richardson, Texas 75081 • (972) 479-9078

(Revised 07/22/2020)

This publication is provided in cooperation with



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# **DATA QUALITY MANUAL**

# **International Leadership of Texas Charter School 2020-2021**

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## INTRODUCTION

The International Leadership of Texas Data Quality Manual has been compiled to provide district and campus personnel with a detailed overview of the data collection process and its impact on state funding, compliance, and accountability. Procedures and processes designed to improve data quality accuracy and integrity through the implementation of a district-wide data quality initiative are presented as described.

The manual addresses each type of data required for funding and compliance and provides:

- Data type
- Standard procedures for data collection
- Eligibility requirements or mandated procedures and processes
- Documentation required to support coding
- Audit preparation including problems experienced in previous audits

## PROGRAMS

- The International Leadership of Texas Data Quality Manual includes specific program requirements, procedures, and forms that relate to the gathering of data reported to TEA. These programs may also have separate operation manuals.
- Though every effort has been made to insure the accuracy of the content contained within this document, frequent changes to federal laws and state mandates can potentially impact the policies and procedures outlined within the International Leadership of Texas Data Quality Manual. Any questions should be directed to those responsible for the program in question.

## DATA QUALITY MANUAL HISTORY

School districts receive a large percentage of their operational funds from state and federal agencies; therefore, specific documentation and reporting requirements have always existed in order for districts to receive these funds. In addition, the districts have been audited by the agencies supplying the funds in order to verify that the districts were eligible to receive the funds requested and determine that the money was spent properly.

Prior to 1984, the reporting burden on the districts was massive and much of the information requested was duplicated in different reports; for example, one enrollment report might request the number of students in the district by grade level and sex while another report asked for the same information by sex and ethnic category. However, when the two reports were compared, the total number of students did not agree because the reporting terms, such as “enrolled” or “in membership” were open to interpretation.

Many of the reports asked for “unduplicated” counts, which was an almost impossible task in a district with high mobility and a largely manual (paper) reporting system which reported only totals by campus or district.

School districts appealed to state legislatures to ease the reporting burden by requiring the Texas Education Agency (TEA) to reduce the number of reports required and establish an oversight function to provide the district with all the reporting requirements for the school year at the beginning of the year in standard formats.

In late 1984, just after the passage of House Bill 72, the TEA decided to convene an Agency-wide task force to examine the reporting implications of the new legislation. After considerable study of the upcoming accountability requirements and consultation with several other states, the task force’s recommendation was that a coordinated database for accountability was needed. The review group foresaw the Agency’s need to have the ability to respond to the almost infinite variety of queries for school district information made by policy makers. Detailed, rather than aggregated data would be necessary in order to have a flexible system.

This new system became known as the Public Education Information Management System (PEIMS). The first PEIMS collection took place in the fall of 1987. The organization, budget, payroll, and staff demographic and responsibility data were collected. The requirement that all school districts submit data through the PEIMS is found in Texas Education Code (TEC) § 42.006.

There are four PEIMS submissions each year. Only three of them contain student data. The mid-year submission contains financial data only.

During the 2012-2013 school year, the Texas Education Agency began the process of completely overhauling data reporting system used by LEAs. During the fall of 2012, schools were introduced to the Texas Student Data System which would integrate all components of PEIMS in addition to other data that would ultimately be reported. Based on the current projection, the Texas Student Data System (TSDS) would be fully implemented by the 2016-2017 school year.

# **FEDERAL AND STATE COMPLIANCE**

## FEDERAL AND STATE COMPLIANCE

### **Program Contact and Accountability**

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Krystal Lovato, Executive Director of Federal Programs, [KLovato@iltexas.org](mailto:KLovato@iltexas.org)

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### **Definition**

Executive Director of Federal Programs is the administrative point person who is responsible for assimilating federal data requirement changes and developing policies and procedures to implement those changes. Chief Financial Officer is the administrative point person who is responsible for assimilating state data requirement changes and developing policies and procedures to implement those changes.

### **Information Distribution**

Monitor and report on legislative actions which may impact International Leadership of Texas. Revise, distribute, and ensure training for school and district staff on use of the Elementary Guidelines and the Secondary Guidelines. Provide training for school staff on mandated policies and procedures and monitor response where specific action is required.

### **Data Monitoring and Problem Identification**

Monitor data related to funding eligibility, accreditation, and compliance to determine that appropriate documentation is being maintained and to identify discrepancies, errors, or omissions of data that impact these issues. Monitor specialized student-related reporting such as discipline, dropouts, Student Success Initiative, etc. to ensure compliance with all reporting specifications.

### **Data Quality**

Improve the quality of student data which impacts funding, accreditation and compliance through increased extensive, on-site campus auditing and monitoring. Interface with International Leadership of Texas departments to get input on required documentation for their area of responsibility and identify potential data problems in that area. Implement or initiate standard procedures to verify that student data meets all state requirements. Train and monitor school staff in this process.

### **Data Accountability**

Executive Director of Federal Program is responsible for editing all reports or surveys submitted by International Leadership of Texas to state and federal agencies. DLI/ELL coordinator is responsible for requests by other entities, such as the media, to determine if data are compatible with PEIMS data, are reasonable based on trend analysis, and comply



with the requirements or instructions designated by the report, survey or request. Approve all reports, surveys, and requests prior to submission or release.

### **Compliance**

Monitor and identify campus and district compliance with local, state, and federal mandates concerning reporting of student data and school operations. Notify principals when school practices are not aligned with policy and state regulations. Provide support for school staff in coding student data for funding and accountability.

### **Student Records**

Maintain electronic file of transcripts and census data for graduates and inactive students in order to provide copies to the public, to colleges and universities, and to businesses, upon request. Supervise and provide training for school record clerks and registrars. Monitor state regulations regarding record management and maintenance of the Academic Achievement Record. Facilitate storage of inactive records for closed schools.

How the charter school maintains attendance records (including computerized records, period absence slips, and official calendar) after the completion of the school year; and what backup systems are in place to protect the attendance accounting records.

1. Attendance records: Attendance records are maintained electronically by vendor ISCorp.
2. Backup systems are in place to protect the attendance accounting records as follows:
  1. Daily backups are preserved for one month
  2. Weekly backups are preserved for three months
  3. Monthly backups are preserved for one year
  4. Annual backups: ISCorp maintains Long-Term Data Archiving for ten years and copies are sent to the School upon the School's request.
  5. Offsite backups: ISCorp sends encrypted backups to an offsite facility daily Monday through Friday.
3. Official calendar: ILTexas maintains an electronic copy of its official calendar on a Google Drive cloud server. The calendar is maintained on that server indefinitely after the end of the school year.

### **Records Management**

Serve as Records Management Office appointed by International Leadership of Texas Board of Education as prescribed by Local Governments Records Act and implement, monitor, and supervise a records management program in the district to ensure compliance with all provisions and mandates of the Act.

Facilitate use of the Texas Records Exchange (TREx) by district personnel.

## **Improving Data Quality**

Planning is the key in any project with the goal to improve the quality of the data reported to state and federal agencies. The district PEIMS coordinator receives PEIMS related information. They are responsible for dissemination of information to other staff in a timely manner. Every staff member who is responsible for information reported to PEIMS must have documentation and training made available to them. A campus administrator will assume the responsibility for verification of the data and implement procedures to address any data quality issues.

## **Data Analysis and Verification**

The more verification that can be incorporated into a school's regular data-generating activities, the better data the school district is likely to produce. It is much easier and more efficient to identify and correct mistakes on a current basis rather than on an historical basis. PEIMS reporting is much easier if the information is collected and reviewed regularly rather than all at once before the reporting deadline.

The Campus PEIMS clerk, in conjunction with the responsible staff, should devise a list of reasonableness and accuracy tests appropriate for each data element or set of data elements. For example, reasonableness and accuracy tests could consist of comparing certain results with results from prior years or establishing allowable ranges for certain items. A school's goal should be to edit information on an on-going basis rather than only when information is submitted for PEIMS. This process promotes better data for day-to-day school district operations rather than just during PEIMS submission.

The PEIMS reporting process provides several good examples in which day-to-day data review and analysis can be combined with one-time review and editing to provide accurate information. For example, if a school collects and processes attendance information on a daily basis and reviews the attendance data at the end of each six-week reporting period, then the process of attendance reporting for PEIMS is simplified. Problems and inaccuracies are corrected at the end of each six-week period when the personnel who collect the data are more likely to remember what caused the problem. When the information is due, the school completes the final six-week period as usual, edits the data for the year, and reviews each reporting period for reasonableness. This process is more likely to result in fewer errors than a process that attempts to correct attendance data for the year on or near the PEIMS reporting deadline.

## **Campus Professionals and Data Entry Staff**

- Responsible for overseeing the reasonableness and accuracy of data by designing and implementing procedures at the campus to insure the data that affects funding, compliance, or accreditation is complete; and correct by identifying areas of concern and determining corrective action. Advise the campus principal of the status of data quality on a regular basis.
- Collaborate with principal to designate campus contacts for each data type that impacts, funding, compliance, and accreditation.

- Compile a list of persons at the campus responsible for special program content knowledge should be distributed to the necessary personnel.
- Identify, document and supply data reporting timelines and procedures to any personnel affected by them.
- Compile regular status reports for the principal regarding data quality at the campuses.

### **Data Entry Personnel**

- Responsible for entering data as specified by a campus professional staff member.
- All data entry persons must be trained in the district's SMS software system in a timely manner.
- Become familiar with the policies in the Student Attendance Accounting Handbook
- Have copies of the Elementary and Secondary Guidelines available.
- Have copies of the data reporting timelines as well as the list of the personnel responsible for providing them with the data to enter into the computer.

Provide verification reports to the special program coordinators to be checked for accuracy of the data in the system. These reports must be provided in time to make necessary corrections before the PEIMS submissions.

# **DATA ASSIMILATION AND REPORTING**

## **DATA ASSIMILATION AND REPORTING**

### **Program Contact and Accountability**

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### **Public Education Management System (PEIMS)**

The submission of Public Education Information Management System (PEIMS) data is required of all Texas school districts. It includes all data collected from schools used for evaluating, monitoring, or auditing public education; and it utilizes:

- A standard set of definitions, codes, formats, procedures, and dates
- Standard edit procedures available via the Internet
- An established database design with approved security measures for access
- A production system for loading into the TEA’s enterprise database
- Written documentation of the values stored in the system
- An established life cycle for changes to the system (two years)
- A standard set of reports available on the Internet
- A mandated sunset process to review the justification of all data elements every three years

### **Types of Data Currently Collected**

- The following data is currently being collected for accountability purposes:
- Organization (district and campus identification)
- Staff data (identification, demographic, responsibility)
- Finance data (budget, actual financial, payroll)
- Student identification and demographics

- Student enrollment and special program participation data, which includes Title I, Career and Technical Education, Bilingual/ESL, Pregnancy Related Services, Life Skills Program for Student Parents, Migrant, Immigrant, Gifted/Talented, Optional Flexible School Day Program (OFSDP), and Special Education
- Attendance data (Average Daily Attendance for funding) and summer school attendance
- Classroom Link information
- Course completion data (Grades 1-12 only)
- School leaver data (graduates, dropouts), and
- Disciplinary action data (suspensions, expulsions).

**TEA Utilization of Reported Data**

- Audits
- Legislative Decision-Making
- Calculation of Administrative Costs
- Determine District and Campus Accountability Ratings
- Academic Excellence Indicator System (AEIS) – 1990-2012
- Texas Academic Performance Report (TAPR) – 2012-Current
- School Report Card

**International Leadership of Texas Use of Reported Data**

- Staffing ratios
- Campus budgeting
- School operations
- Enrollment projections
- Budget projections
- Campus boundary revisions
- Monitor Special Programs Expenditures
- Textbook request verification

**Texas Student Data System**

Beginning in 2013-2014, the Texas Education Agency adopted a new process of gathering and reporting data. The Texas Student Data System (TSDS), a major initiative by the Texas Education Agency, is a new statewide system that modernizes and improves the quality of data collection, management, and reporting in Texas education. International Leadership of Texas is scheduled to rollout the TSDS PEIMS and Dashboards during the 2015-2016 school year.

Through the new student GPSTM Dashboards and other improvements, TSDS will support higher student performance across the state.

TSDS also replaces and expands on the existing Public Education Information Management System (PEIMS):

- TSDS modernizes the PEIMS data collection process to reduce technology risk and system downtime allowing for more system availability and ease of use.
- It puts real-time student performance data in the hands of educators to improve student achievement.
- TSDS will become the one common data collection platform for TEA to reduce the data collection burden on districts and charter schools.

**Access to PEIMS**

- The PEIMS application is only available to authorized LEA, campus, and ESC staff. A TEA issued logon is required to access the application.
- Only Superintendents or persons acting in the role and responsibility of a Superintendent may certify a PEIMS submission through the electronic Statement of Approval (SOA). This responsibility may not be delegated or shared with a second person

**PEIMS Submission Process**

- Campus Input of Data
- Data Edited at Campus and Reviewed for Accuracy
- Errors Corrected and Edited Again at Campus Level
- District Aggregation of Campus Data
- Data Edited at District Level
- Address All Fatal Error, Special Warnings and Warnings
- Data Reviewed and Superintendent's Signature Assigned
- Notify Educational Service Center
- Educational Service Center Completes Edit Process (as per service contract)
- Approval forwarded to the TEA by Educational Service Center

**PEIMS Submission Schedule**

Submission dates are determined by the TEA and may vary by a day or two each year. Provisions for a resubmission exist for each submission approximately three weeks later. In addition, there are separate provisions for year-round-schools. All submission dates and resubmission dates are published in the Legacy PEIMS Data Standards. The district is responsible for delivery of the data to TEA by the specified due dates. Extensions will not be approved unless substantiated by extreme circumstances (e.g., fire in administration building).

**Submission 1 (Fall Snapshot)** - This submission includes every student enrolled in school by the “as of” date, which is the last Friday in October and their special program participation. It also includes all the students who were enrolled the previous year but who are not enrolled this year (graduates, dropouts, and students who enrolled in some other school system).

**Submission 2 (Mid-Year)** - This submission includes organizational data and the actual financial data from the previous year.

**Submission 3 (End-of-Year / Summer)** - This submission is a cumulative record of student attendance and contact

hours for special programs, course completion, and disciplinary actions (expulsions and suspensions) for the entire school year. State funding is based on this submission.

**Submission 4 (Extended Year)** - This submission is a cumulative record of attendance in the summer school provided for students who do not meet promotion standards in the regular school year and/or the students served by special education who are expected to regress over the summer months without continued services (Extended School Year– ESY). Funding for summer school is based on this submission.

**Nurses’ Report** – Schools are mandated to insure students are adequately immunized and that each student is screened for vision and spinal issues. Records of these screenings are maintained by each campus nurse and must be submitted by the district to the Texas Department of State Health Services.

The information collected for PEIMS is utilized by TEA in the following ways:

Submission 1 SNAPSHOT	Submission 2 Actual Financial Data Prior Year	Submission 3 Summer	Submission 4 End-of-Year
<p><b><u>Included Data:</u></b></p> <ul style="list-style-type: none"> <li>❖ <b>snapshot data</b> – data reflect the status of the district on the last Friday of October. Data includes budget, staff, organization, and student data.</li> <li>❖ <b>leaver data</b> – data on graduates, dropouts, and other school leavers identified during the prior school year. (i.e.: 2009-2010 reports leavers for 2008-2009)</li> </ul>	<p><b><u>Included Data:</u></b></p> <ul style="list-style-type: none"> <li>❖ actual audited</li> <li>❖ financial data from the previous year</li> </ul>	<p><b><u>Included Data:</u></b></p> <ul style="list-style-type: none"> <li>❖ student attendance data,</li> <li>❖ course completion data &amp; Classroom Link information                             <ul style="list-style-type: none"> <li>❖ discipline data,</li> <li>❖ restraint data, and</li> </ul> </li> <li>❖ Title I, Part A data.</li> </ul>	<p><b><u>Included Data:</u></b></p> <ul style="list-style-type: none"> <li>❖ Dual credit courses completed during the summer</li> <li>❖ extended school year services (ESY) data, and</li> <li>❖ bilingual/ESL summer school program.</li> </ul>



<p><b><u>Used to:</u></b></p> <ul style="list-style-type: none"> <li>❖ calculate compensatory entitlement,</li> <li>❖ monitor special programs,</li> <li>❖ report to the federal government,</li> <li>❖ calculate retention,</li> <li>❖ calculate basic profiles for AEIS, and perform desk audits.</li> </ul>	<p><b><u>Used to:</u></b></p> <ul style="list-style-type: none"> <li>❖ report to the state legislature,</li> <li>❖ monitor special, program expenditures,</li> <li>❖ audit districts, and perform desk audits.</li> </ul>	<p><b><u>Used to:</u></b></p> <ul style="list-style-type: none"> <li>❖ calculate FSP final allotments,</li> <li>❖ calculate attendance and course completion,</li> <li>❖ create a portion of the AEIS,</li> <li>❖ augment the monitoring of special programs, and perform desk audits.</li> </ul>	<p><b><u>Used to:</u></b></p> <ul style="list-style-type: none"> <li>❖ calculate ESY funding,</li> <li>❖ calculate BIL/ESL summer school funding,</li> <li>❖ monitor special programs, and perform desk audits.</li> </ul>
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**Timelines and Verification of Tasks**

The International Leadership of Texas PEIMS Department has established timelines for all student information. Timelines reflect dates and deadlines for each step of the data quality process. The schools are responsible for delivery of student data on the specified due dates.

**LEA and Campus Deadlines**

Campus data is to be verified and submitted to the LEA by the dates below.

**Fall Collection (prior/current year data)**

First submission- December 5, 2019

Resubmission- January 16, 2020

**Midyear Collection (prior year data)**

First submission-January 30, 2020

Resubmission-February 13, 2020

**Summer Collection (current year data)**

First submission-June 18, 2020

Resubmission- July 16, 2020

**Extended Year Collection (current year data)**

First submission-August 27, 2020

Resubmission- September 17, 2020

LEA data submission timeline is in accordance with the **2019-2020 SUBMISSION AND**

RESUBMISSION TIMELINES.

# Submission Timelines by Collection

<b>TSDS Collection s</b>	
<b>TSDS ready to load data to eDM</b>	<b>August 5, 2019</b>
<b>PEIMS Fall Submission (Submission 1)</b>	
<b>PEIMS Fall Submission ready for users to promote data</b>	<b>September 9, 2019</b>
<b>Close of school-start window - Last Friday in September</b>	<b>September 27, 2019</b>
<b>PEIMS Fall snapshot date</b>	<b>October 25, 2019</b>
<b>TSDS PEIMS ready for users to complete, approve, and accept submissions</b>	<b>October 28, 2019</b>
<b>Requests to retire Unique IDs due at TEA</b>	<b>November 29, 2019</b>
<b>PEIMS Fall first submission due date for LEAs and ESCs</b>	<b>December 5, 2019</b>
<b>Requests to retire Unique IDs due at TEA</b>	<b>January 10, 2020</b>
<b>PEIMS Fall resubmission due date for LEAs and ESCs</b>	<b>January 16, 2020</b>
<b>PEIMS Fall data available to customers</b>	<b>February 13, 2020</b>
<b>PEIMS Mid-Year Submission (Submission 2)</b>	
<b>PEIMS Mid-Year Submission ready for users to promote data</b>	<b>November 11, 2019</b>
<b>TSDS PEIMS ready for users to complete, approve, and accept submissions</b>	<b>December 9, 2019</b>
<b>PEIMS Mid-Year first submission due date for LEAs and ESCs</b>	<b>January 30, 2020</b>

<b>PEIMS Mid-Year resubmission due date for LEAs and ESCs</b>	<b>February 13, 2020</b>
<b>PEIMS Mid-Year data available to customers</b>	<b>March 5, 2020</b>
<b>PEIMS Summer Submission (Submission 3)</b>	
<b>PEIMS Summer Submission ready for users to promote data</b>	<b>March 2, 2020</b>
<b>TSDS PEIMS ready for users to complete, approve, and accept submissions</b>	<b>May 18, 2020</b>
<b>Requests to retire Unique IDs due at TEA</b>	<b>June 12, 2020</b>
<b>PEIMS Summer first submission due date for LEAs</b>	<b>June 18, 2020</b>
<b>Requests to retire Unique IDs due at TEA</b>	<b>July 10, 2020</b>
<b>PEIMS Summer resubmission due date for LEAs *</b>	<b>July 16, 2020 *</b>
<b>PEIMS Summer data available to customers</b>	<b>September 17, 2020</b>
<b>PEIMS Extended Year Submission (Submission 4)</b>	
<b>PEIMS Extended Year Submission ready for users to promote data</b>	<b>March 24, 2020</b>
<b>TSDS PEIMS ready for users to complete, approve, and accept submissions</b>	<b>August 5, 2020</b>
<b>Requests to retire Unique IDs due at TEA</b>	<b>August 21, 2020</b>
<b>PEIMS Extended Year first submission due date for LEAs</b>	<b>August 27, 2020</b>
<b>Requests to retire Unique IDs due at TEA</b>	<b>September 11, 2020</b>
<b>PEIMS Extended Year resubmission due date for LEAs</b>	<b>September 17, 2020</b>

<b>PEIMS Extended Year data available to customers</b>	<b>October 15, 2020</b>
<b>Early Childhood Data System Collection (ECDS) - (Kindergarten Submission)</b>	
<b>ECDS Kindergarten ready for users to promote data</b>	<b>November 11, 2019</b>
<b>ECDS Kindergarten submission due date for LEAs</b>	<b>January 30, 2020</b>
<b>ECDS Kindergarten data available to customers</b>	<b>February 13, 2020</b>
<b>Early Childhood Data System Collection (ECDS) - (Prekindergarten Submission)</b>	
<b>ECDS Prekindergarten ready for users to promote data</b>	<b>November 11, 2019</b>
<b>ECDS Prekindergarten submission due date for LEAs and Private Prekindergarten Organizations</b>	<b>July 16, 2020</b>

<b>Private Prekindergarten application deadline for BPD (Business Partner Directory) Org number</b>	<b>June 26, 2020</b>
<b>ECDS Prekindergarten data available to customers</b>	<b>July 30, 2020</b>
<b>Residential Facility Tracker (RF Tracker) Collection</b>	
<b>RF Tracker ready for users to promote data</b>	<b>September 9, 2019</b>
<b>RF Tracker submission due date for LEAs</b>	<b>July 30, 2020</b>
<b>RF Tracker data available to customers</b>	<b>August 13, 2020</b>
<b>State Performance Plan Indicator 14 (SPPI-14) Collection</b>	
<b>SPPI-14 ready for users to promote data</b>	<b>September 9, 2019</b>

<b>SPPI-14 submission due date for LEAs</b>	<b>February 20, 2020</b>
<b>Classroom Roster Collection</b>	
<b>Classroom Roster Fall snapshot date – Last Friday in September</b>	<b>September 27, 2019</b>
<b>Classroom Roster Fall Submission due date for LEAs</b>	<b>October 17, 2019</b>
<b>Classroom Roster Winter snapshot date – Last Friday in February</b>	<b>February 28, 2020</b>
<b>Classroom Roster Winter Submission due date for LEAs</b>	<b>March 19, 2020</b>

**2019-2020 Submissions Sorted by Due Date**

<b>October 17, 2019</b>	<b>Classroom Roster Fall Submission due date for LEAs</b>
<b>December 5, 2019</b>	<b>PEIMS Fall first submission due date for LEAs and ESCs</b>
<b>January 16, 2020</b>	<b>PEIMS Fall resubmission due date for LEAs and ESCs</b>
<b>January 30, 2020</b>	<b>PEIMS Mid-Year first submission due date for LEAs and ESCs</b>
<b>January 30, 2020</b>	<b>ECDS Kindergarten submission due date for LEAs</b>
<b>February 13, 2020</b>	<b>PEIMS Mid-Year resubmission due date for LEAs and ESCs</b>
<b>February 20, 2020</b>	<b>SPPI-14 submission due date for LEAs</b>
<b>March 19, 2020</b>	<b>Classroom Roster Winter Submission due date for LEAs</b>
<b>June 18, 2020</b>	<b>PEIMS Summer first submission due date for LEAs</b>

<b>July 16, 2020 *</b>	<b>PEIMS Summer resubmission due date for LEAs *</b>
<b>July 16, 2020</b>	<b>ECDS Prekindergarten submission due date for LEAs and Private Prekindergarten Organizations</b>
<b>July 30, 2020</b>	<b>RF Tracker submission due date for LEAs</b>
<b>August 27, 2020</b>	<b>PEIMS Extended Year first submission due date for LEAs</b>
<b>September 17, 2020</b>	<b>PEIMS Extended Year resubmission due date for LEAs</b>

**\* LEAs registered with TEA with year-round tracks ending later than June 18, 2020 may delay Summer resubmission until two weeks following completion of the latest year-round track or August 13, 2020, whichever comes first. However, the initial data delivery for submission 3 must still be made by June 18, 2020, for all LEAs. In no case will any resubmission be processed after August 13, 2020. Data Corrections made after August 13, 2020 will be processed by State Funding.**

**TSDS Unique ID**

Beginning in July of 2013, all staff and students must be assigned a TSDS Unique ID. The purpose of the Unique ID is another form identifying and tracking students and staff outside of using the individual’s social

security number or state issued identification number. Students and district employees are required to be assigned a Unique ID. The Unique ID assignment process within the TSDS Unique ID system consists of six distinct steps:

1. Data submission
2. File validation
3. Data validation
4. Assign ID
5. Resolving near matches
6. Download IDs

It is the responsibility of the Data Coordinator to make sure that each student and faculty member receive a Unique ID. This is accomplished by running and extracting a Unique ID list from the SMS system that will then be uploaded into the TSDS system. TSDS will match the students with their Unique ID and provide a file that will need to be downloaded and imported back into the SMS system. Detailed instructions on the import and export process can be found at <http://www.texasstudentdatasystem.org>

#### **PET Reporting Changes for 2018-2019**

Effective with the 2018-2019 school year, the Legacy PET data submission application will no longer be the method in which to submit your person enrollment tracking data to TEA. Beginning in the spring of 2018, enrollment tracking data will be submitted through the Unique ID application. PET will be known as the Unique ID Enrollment Tracking. Please refer to Section 9 (TSDS Unique ID) of the TEDS Data Standards for the reporting requirements.

[https://www.texasstudentdatasystem.org/TSDS/TEDS/1819F/TEDS\\_Section\\_9\\_Unique\\_ID\\_Specifications/](https://www.texasstudentdatasystem.org/TSDS/TEDS/1819F/TEDS_Section_9_Unique_ID_Specifications/)

The Legacy PET application will continue to be accessible for searching historical enrollment data or running reports on previously submitted data until the 2019-2020 school year.

# **CAMPUS DATA**



## CAMPUS DATA

### Program Contact and Accountability

Principal on campus will be the person of Program Contact and Accountability

### Definition

Principals are directly responsible for all records in their school and must ensure that all data is correct and accurate. It is also the responsibility of the principal to assign all data entry and monitoring functions to appropriate personnel and hold them accountable for these activities. The principal must determine the security level at which each staff member may function. Security levels may have to be adjusted during certain time periods to accommodate specific functions, i.e., PEIMS, TSDS, scheduling, grade reporting, summer school registration and reporting, or in the absence of personnel with security authorization in the impacted area. **The principal should perform periodic checks to monitor the quality of data and implement corrective actions, where necessary, to implement an in-house monitoring system.**

### Importance of Accurate Computer Data

In International Leadership of Texas, all PEIMS data is entered by the campus' Registrar, the PEIMS extracts are processed, and reports are run through the Student Management System to verify data. Even if the data's paperwork trail is correct, if it is not on the computer, it will not be reflected on the reports and, therefore, not reported to TEA.

The master schedule file must be accurate and up-to-date, since PEIMS staffing data is derived from matching the personnel file to the courses and number of students each teacher is teaching.

The scheduling and grade reporting data must be accurate and up-to-date, since PEIMS data elements such as course completion and staff schedules are derived from these files. Any missing course or grade may result in inaccurate reporting for the school.

Extracurricular eligibility is also dependent on accurate up-to-date grade reporting data. Any student who receives a grade below 70, an incomplete, or a blank grade is ineligible, not only for UIL sponsored events but also for all other designated extra-curricular activities. If a teacher fails to input grades for a particular class, every student in that class appears on the UIL ineligible report.

All student ID numbers must be unique and accurate. If identical ID numbers are posted at two different schools, a conflict is recorded and funding data is significantly impacted.

The student social security number (if available) or the sending school's nine-digit PEIMS Identification Number must appear on each check-out sheet if a student withdraws. It is the sending school's responsibility to assist the receiving school attempting to enroll a student regarding checkout information, especially social security numbers or PEIMS ID numbers. It is the receiving school's responsibility to ensure during the enrollment process of a new student that the student's social security number or PEIMS ID number and the student's International Leadership of Texas local ID

number are secured. If all efforts fail to yield a social security number or a PEIMS number from the previous district, assistance may be requested from TEA. **Do not assign a new PEIMS number unless the student has never been enrolled in a Texas public school.**

All student data — demographics, membership (entries and withdrawals), absences, program eligibility, discipline, grades, etc., - must be on file. Missing data results in a "Fatal Error" on PEIMS, and the student will not be counted for funding or program enrollment, resulting in a loss of program funds. In the Average Daily Attendance (ADA) system alone, if 10 students are not counted for funding purposes, the district loses significant funding. This does not include funds for special program enrollment, which would also be lost.

It is important to recognize the difference between a "fatal error" and a "warning message." All fatal errors must be corrected. A fatal error indicates that the data is not acceptable in its present form. TEA will not accept data with fatal errors. A warning indicates that this is an unusual condition, and TEA would like for the data to be carefully scrutinized to see if it is correct before it is submitted. Most of the time, the warnings can be corrected; however, if the data reflects the truth, no action is required. An example of this might be a student in the 9th grade that is 21 years old. This condition would cause a warning message, but if the student actually is 21 years old and in the 9th grade, the data should not be changed. Excessive numbers of certain warnings are cause for an on-site investigation; therefore, research and correction should continue until all "warnings" are addressed or the re-submission deadline is past.

Although schools must be fatal free by the submission deadline, staff should continue to review the data for accuracy and make corrections until the deadline for resubmission is past.

All corrections to PEIMS data must be made at the campus level prior to the re-submission deadline.

### **Data Quality**

Policies and procedures must be developed and maintained at the district and campus level in order to maintain data integrity. Procedures must be outlined in the Data Quality Manual and revised as deemed necessary.

### **Data to be reviewed**

Ownership and responsibility must be assigned for all types of data that impacts funding, accreditation, and compliance (department heads, project managers, school principals, etc.), as well as enforcement of accountability for data quality.

- 1 AAR – Transcripts
- 1 ADA Attendance Accounting
- 1 At-Risk Student Data

- 1 CTE
- 1 Course and Credit Validation (Course Completion)
- 1 Discipline –Gun-Free Schools Act, DAEP, JJAEP, and Suspension
- 1 Extracurricular Activities/UIIL Eligibility and Co- curricular/Extracurricular Data
- 1 Free/Reduced Lunch
- 1 Gifted and Talented Education
- 1 Grade Reporting – Missing Grades, Grade Books, Grade Change
- 1 Documentation, Course Completions
- 1 Graduates and Related Data
- 1 Health Services – Immunizations 1 Homeless
- 1 English Learners (EL/LEP) – Immigrants/Migrants
- 1 Master Schedule – Student Scheduling
- 1 Office of Civil Rights (OCR)
- 1 Optional Extended Year Program (OEYP)
- 1 PEIMS
- 1 PEIMS Staff PID – 090 Records
- 1 PEIMS Student PID
  - o Life Skills Program for Student Parents
  - o Pre-kindergarten Eligibility or Pregnancy Related Services (PRS)
  - o Section 504
  - o Special Education – Extended School Year (ESY), Early Childhood

#### Placement

- 1 Dropout Initiatives – GED
- 1 Dyslexia
- 1 Economically Disadvantaged
- 1 Enrollment Verification, Membership Data, Tuition, Withdrawals/Leavers
- 1 External Funding – Title I, Title VI, Compensatory Education

**Verification Reports and Timelines**

STUDENT PROGRAM	REPORTS RUN FROM SMS			EDIT+ REPORTS
	2-3 WEEK AFTER SCHOOL STARTS	END OF EVERY SIX WEEKS	2 WEEKS PRIOR TO FALL SNAPSHOT DATE	FALL, SUMMER, OR EXTENDED YEAR SUBMISSION DATE
At-Risk			X*	Fall
Attendance		X*		Summer*
Bilingual/ESL	X	X*	X*	Fall and Summer*
Career and Technical Education		X*	X*	Fall and Summer*
Disciple		X		Summer*
Economically Disadvantaged	X		X*	Fall
Extended School Year Services (ESY)				Extended Year
Gifted and Talented	X	X*	X*	Fall and Summer*
Grades		X		Fall and Summer
Course Completion (Grades 9-12)		X**		Summer
Graduates	X		X*	Fall
Leavers/Withdrawals	X	X	X*	Fall
Life Skills for Student Parents Program	X	X*		Summer*
Migrant/Immigrant	X		X*	Fall and Summer*
Master Scheduling/Scheduling	X			
Immunizations	X	X		
Optional Extended Year Services (OEYP)		X*		Extended Year
PID/PET	X			Fall, Summer, and Extended Year
Pregnancy Related Services (PRS)	X	X*		Summer*
Special Education	X	X*	X*	Fall and Summer*
Staff Data	X			Fall
125% Rule for Special Ed. State Requirement		X	X	
Title I, Part A	X	X	X*	Fall and Summer*

Source: Region XVII ESC

\*Have a sign off sheet returned affirming verification

\*\*To be checked at the end of each grading period

**Campus PEIMS Coordinator Checklist**

**District/Campus Student Program Contacts**

PROGRAM	DISTRICT COORDINATOR OR DIRECTOR	CAMPUS CONTACT
At Risk	Angela Marcellus	Counselor
Attendance	Myrna Apodaca	Attendance Clerk
LEP/BIL/ESL	Veronica Csorvasi	LPAC Administrator
Career Tech	Joseph Roman	Counselor
Discipline	Angela Marcellus	Principal/Assistant Principal
Economic Disadvantage	Yolanda Banks	N/A Call District
Extended School Year (ESY)	Shannon Urbina	Special Education Lead
Gifted and Talented	Ashley Neuschwander	Principal/Assistant Principal
Grades/Course Completion	Laura Carrasco/Angela Marcellus	Principal/Assistant Principal
Graduates	Laura Carrasco/Angela Marcellus	Counselor
Leavers	Myrna Apodaca	Registrar

**Impact of Inaccurate Campus Data**

- Financial - loss of state funds
- Accreditation status
- Compliance reprimand

**TEA Funding or Compliance Audits**

- Duplicate Attendance
- Students with Perfect Attendance and No Course Completion Indicator

- Students Coded '0', '4', or '5' on the “Snapshot” but Coded Eligible for Attendance for the School Year
- Kindergarten Students Enrolled Under the Age of Five
- Early Education Students with No Special Education Setting or Speech Therapy Only
- Bilingual/ESL Education Eligibility Coding on the Snapshot
- 7th and 8th Grade Students Earning Career and Technical Contact Hours
- Homebound and Hospital Class School Students Earning Career and Technology Contact Hours
- Student enrolled in Pregnancy Related Services for more than 70 days

### **RECORD TAMPERING**

**It is a third degree felony to tamper with a government record that is a public school record, report, or assessment required under Chapter 39, Texas Education Code. If the intent of the tampering is to defraud or harm another, then the offense is a felony of the second degree.**

# **ATTENDANCE ACCOUNTING**

## **ATTENDANCE ACCOUNTING**

### **Program Contact and Accountability**

Principal on campus will be the person of Program Contact and Accountability

Principal shall designate appropriate campus personnel to whom all attendance coding questions should be directed.

### **Definition**

As per the Student Attendance Accounting Handbook that is put out by the Texas Education Agency each year, a detailed outline of policy of procedures regarding attendance accountability must be kept and maintained by the district and followed by campus personnel whose responsibilities include student attendance.

### **2.2.5 Attendance System Procedures Manual**

*Your district or charter school must maintain a procedures manual that provides specific, detailed information on the district's school attendance accounting system. This procedure manual must include the following information:*

- *how and when teachers are to take official attendance*
- *how attendance is entered into the attendance accounting system which positions is/are responsible for the coding of special programs(such as career and technical, special education, Pregnancy Related Services, etc.*
- *how changes to special programs are to be documented*
- *how student membership is to be reconciled between the teacher rosters and the attendance accounting database*
- *how your district will maintain attendance accounting records (including computerized records, period absence slips, and official calendar) after the completion of the school year*
- *what backup systems are in place to protect the attendance accounting records*
- *which position is responsible for the maintenance and security of the attendance accounting records*



**Eligibility**

A student must be enrolled for at least **two hours** of instruction, five days a week to be considered in **membership** for **one-half day** and for at least **four hours** of instruction, five days a week to be considered in membership for **one full day**. Students who are not scheduled to attend at least two hours, five days a week should be enrolled with an **ADA eligibility code of 0 – Enrolled, Not in Membership**.

Instructional time in Dual Credit courses does not apply to ADA eligibility.

ADA is based on the number of days of instruction in the school year. Every school must have an instructional day that is at least seven hours in length.

Official ADA time for taking attendance during the second instructional hour of the day must be established at each campus prior to the first day of school. Once a time has been selected, a campus may not change it during the school year. Permission for recording absences in an alternate period, such as for testing days, must be obtained in advance from the International Leadership of Texas Charter School PEIMS Department.

**Texas Education Agency Rules**

Each school must have a copy of the current **Student Attendance Accounting Handbook** published by the Texas Education Agency. The rules in the State handbook govern the procedures used by all districts. No school officer or any other person in the school district has the authority to change these instructions. At the end of the year, all records must be signed by a certified person and delivered to the superintendent, who is responsible for the safekeeping of all attendance records and reports. Each year, instructions will be sent to schools regarding packaging and delivery of attendance documents. The following personnel must be aware of their responsibilities in following the state rules for attendance accounting: administrators, teachers, special program coordinators, and attendance personnel.

The **principal** of each campus is responsible for reviewing his or her Campus Summary Reports for completeness and accuracy. Reports from the Texas Education Agency (TEA), which reflect Public Education Information Management System (PEIMS) data, should be compared to locally-produced reports for reasonableness and accuracy. The principals affirm that they have checked, or caused to be checked, the accuracy and authenticity of the attendance data by signing the Campus Summary Report. The principal is ultimately responsible for the accuracy and safekeeping of all attendance records and reports. These records must be available for audit.

The **teacher** who initially records an absence is responsible for the accuracy of the report and attests to the validity of the data with his or her signature – or, in the case of a paperless attendance accounting system, with his or her entry of those data using the teacher’s logon with a district secret password.

The **attendance personnel** generating absence summaries and/or transcribing the absences or coding information into the computer are responsible for adhering to all laws and regulations pertaining to student attendance accounting. Each person entering data into the attendance accounting system must sign an affidavit attesting that the data he or she has entered is true and correct to the best of his or her knowledge. **In no case should attendance personnel be assigned the responsibility of determining a student’s coding information.**

<u>Code</u>	<u>Description</u>	<u>Documentation Required</u>
<b>C; C- CT</b>	<b>COURT</b>	<b>Court Documents with date -1 day to and from to travel</b>
<b>D</b>	<b>ATHLETIC EVENT</b>	<b>Signed and dated roster from Skyward</b>
<b>E-DR</b>	<b>EXCUSED PER DR</b>	<b>Signed and dated Dr. note - an over the phone or virtual appointment will not be considered as a visit with a healthcare professional.</b>
<b>E-EC</b>	<b>EXCUSED EXTENUATING CIRCUMSTANCE</b>	<b>Funeral- Obituary - or note from the parent - approved by principal</b>
<b>E- OE</b>	<b>EXCUSED OTHER EXCUSED;</b>	<b>Parent note explaining the situation - approved by the principal.</b>
<b>E-IL</b>	<b>EXCUSED ILLNESS</b>	<b>Note from parent stating illness with date - within 3 days of the absence. Can be used when the nurse sends the student home after ADA time, with the office visit documented in the clinic log.</b>
<b>E-US</b>	<b>EXCUSED US NAT/CIT</b>	<b>Documentation from citizenship office or ceremony- 1 day to and from to travel</b>

<b>E-VI</b>	<b>EXCUSED VISIT HIGHER EDUCATION</b>	<b>Documentation from the colleges</b>
<b>E- EL</b>	<b>EXCUSED ELECTION CLERK</b>	<b>Documentation from the Clerk's Office with date</b>
<b>F; F-FT</b>	<b>FIELD TRIP</b>	<b>Signed and dated rosters</b>
<b>G; G- OE</b>	<b>MILITARY DEPLOYMENT</b>	<b>Documentation with date of person deployment</b>
<b>H; H-HB</b>	<b>HOMEBOUND</b>	<b>Signed documents from admin over homebound and Dr. Signed and dated log from homebound teacher</b>
<b>H- CEHI</b>	<b>HOMEBOUND PREGNANCY</b>	<b>Documentation from admin over homebound and Dr. Signed and dated log from homebound teacher</b>
<b>I</b>	<b>ISS</b>	<b>ISS is coded by a discipline officer once the action is assigned, no documentation needed.</b>
<b>M; M- DR</b>	<b>MEDICAL DR</b>	<b>Note from DR is required; students MUST have attended a portion of the school day.</b>
<b>O; O- OS</b>	<b>OSS</b>	<b>OSS is coded by discipline officer once the action is assigned on Skyward, no documentation is needed</b>
<b>P; P- DR; P-IL</b>	<b>ABSENCE POST ADA; ABSENCE POST ADA DR Visit (note) or ABSENCE POST ADA - ILLNESS</b>	<b>Signed, timed, and dated log - for elementary use only for early release after ADA time.  Can be used when the nurse sends the student home after ADA time, with the office visit documented in the clinic log.</b>

<b>Q</b>	<b>EXCUSED BY PRINCIPAL</b>	<b>Signed form from administration with dates excused</b>
<b>R; R- HOLY DAY</b>	<b>RELIGIOUS</b>	Signed and dated letter from the church stating the Holy Day or signed letter from the parent (email/handwritten)  Church retreats, camps, and mission trips and individual religious rites (baptisms, christenings, bar mitzvahs, etc.) are not considered holy days.
<b>U</b>	<b>UNEXCUSED ABSENCE</b>	<b>Signed and dated roster; if not recorded via online system</b>
<b>Z</b>	<b>TARDY ABSENT ADA</b>	<b>Signed, timed, and dated log</b>
<b>L</b>	<b>TEACHER WEB TARDY</b>	<b>Entered by the teacher of record via online system</b>
<b>T</b>	<b>TARDY PRESENT ADA</b>	<b>Entered by the office via online system</b>
<b>W</b>	<b>TEACHER WEB ABSENCE</b>	<b>Entered by the teacher of record via online system</b>

**IMPORTANT**

In no case should attendance personnel be assigned the responsibility of determining a student's coding information. Special program staff, directors, and/or teachers should provide attendance personnel with names and coding information of students who are eligible, whose documentation is in order, and who are being served in accordance with an individualized education program (IEP). Special program directors and/or staff are responsible for reviewing special program data and totals for accuracy and completeness. They are also responsible for ensuring that attendance personnel are aware of any changes in a student's services and the effective dates of such changes. The attendance personnel are then responsible for entering the changes in the detailed student attendance accounting system (manual or automated). At the end of each six-week reporting period, special program staff should verify the Student Detail Report for any coding errors.

## **Policy on Classroom Attendance**

Acceptable excuses for absences and tardiness are personal illness, sickness, or death in the family, quarantine, weather, or road conditions making travel dangerous, participation in school activities with permission of the principal, and emergencies or unusual circumstances recognized by the principal or person designated.

Supervision of student attendance will be the responsibility of teachers and school administrators. The role of the principal (and administrative team) is to:

- Establish a period by period attendance management system.
- Design and implement a process for identifying and counseling students with attendance problems.
- Communicate with parents about student attendance problems.
- Approve credit for excused absences.
- Chair the statutorily required School Attendance Committee.

### **The role of the teacher is to:**

- Take attendance at the official time designated and for each class period.
- Maintain accurate attendance records and verify accuracy of Student Management System records.
- Send excuse notes from parents to the office in a timely manner.
- Notify parents when a student returns from an absence without an excuse or has been absent for three or more days.
- Ensure that students make up work for excused and unexcused absences.
- Complete an attendance referral form for appropriate students, in accordance with district guidelines.

## **Classroom First Day of School Procedures**

### **August 13, 2020 - First Day of School**

All staff must realize that the first day count is an important process for the school district. The first day provides administrators with the tools they need to make budgeting and staffing decisions. Every student in attendance on the 1<sup>st</sup> day of school earns state funding, so we must verify and document that every student is “in attendance” on the 1<sup>st</sup> day of school.

It is important that the campus administrator in charge of first day procedures makes all the necessary staff assignments to achieve an accurate and timely first day count. Campus attendance clerks, counselors and registrars play a major role in the 1<sup>st</sup> day reconciliation process.

**The district official attendance time (K-8; 9:30 am and 9-12; 9:40 am) shall be used as the cut-off time for new enrollments for face-to-face and remote instruction. If a student was not present during the official count, he/she** 42

cannot be enrolled (added to the membership count) until the next day.

Students under Option 1 instruction shall make every effort to be present during the official ADA time in order to be considered present “ENROLLED” on day 1. Students under option 1 who are unable to attend by ADA time must be engaged in instruction by 11:59pm, August 13, 2020, to be considered enrolled.

For Option 2 instruction, the cut-off time shall be 11:59 pm; August 13, 2020 to measure student engagement on the 1<sup>st</sup> day of school and be considered “ENROLLED”.

ILTexas will schedule a call to students who have not engaged in learning by 12:00pm using **Classlink** to encourage participation.

The TEA-approved engagement methods are listed below:

1. Daily progress in the Learning Management System (LMS), as defined in the approved learning plan; or
2. Daily progress via teacher-student interactions, as defined in the approved learning plan; or
3. Completion/Turn-in of assignments from student to teacher (potentially via email, on-line, or mail).

**NOTE: ILTexas will primarily use Classlink **to track** student daily progress. In addition, the campuses may use any of the other approved methods.**

### 1<sup>st</sup> “Day Student Engagement (Attendance) Process – Classroom Teachers

1. On the first day of school, **each teacher** should submit attendance via Skyward for ALL students who participated in the lesson via zoom or by other teacher communication. Attendance should be entered in K-8 by 9:30A.M. Attendance in 9-12 should be entered by 9:40 A.M. In addition, secondary attendance must be submitted for each class.

In grades K-8 teachers will review Classlink student participation by 3:00pm to submit student participation for students who participated virtually via an ILTexas approved learning platform or other TEA approved engagement method. Corrections to attendance must be submitted in Skyward by 3:00pm.

In grades 9-12 teachers will review Classlink student participation by 5:00pm to submit student participation for students who participated virtually via an ILTexas approved learning platform or other TEA approved engagement method. Corrections to attendance must be submitted in Skyward by 5:00pm.

As the campus attendance clerk reviews Classlink engagement reports they may reach out to individual teachers to determine student attendance.

2. Any student not in your Zoom or engaged in a learning platform, mark Absent. ALL students that are marked “Absent” will be verified to have met ONE of the engagement measures by 11:59pm. Campus attendance clerks will review Classlink reports on August 14 to determine attendance on Day 1.

3. **Digitally sign and Submit Attendance in Skyward by the times outlined above.** The following video link provides detailed instructions for teachers on how to submit attendance: [Skyward Attendance Recording](#)

**4. Teachers shall submit via email a list of students who participate in their Zoom lesson but do NOT appear on their roster to the campus attendance clerk and GLA Immediately.**

**All counts shall be measured by student engagement as of 11:59 pm on August 13, 2020. Due to the need to verify and document student engagement, the 1<sup>st</sup> day the electronic process must be completed not later than 2:0pm on Friday, August 14, 2020 (the 2<sup>nd</sup> day of school).**

**For remote instruction after the 1<sup>st</sup> day of school, daily attendance will be verified on a weekly basis based on student engagement as noted above. Daily attendance shall be reconciled by **Wednesday 2:00 p.m.** for the prior week of school. Documentation must be on file to support every day that a student is marked present for attendance purposes.**

**NOTE: It is important that the first day enrollment be verified by grade level totals and individual names.**

**1<sup>st</sup> “Day Student Engagement (Attendance) Process – Attendance clerks, Campus Registrars Attendance clerks, Campus Registrars, and GLAs shall reconcile the 1<sup>st</sup> day attendance. The 1<sup>st</sup> day reconciliation process must be completed no later than 2:00 pm; Friday, August 14, 2020.** After the initial reconciliation using the digital reports from Classlink , the Attendance Clerks and Campus Registrars shall verify all of the digital report data and make corrections, as appropriate, if any.

1. After all attendance has been collected, compare lists to verify “no show”. Students who are not listed as present on another list. If a “no show” student is found on another list, correct the student’s “no show” status. Check the students’ schedule and make any necessary corrections.

2. Run Attendance reports and confirm students who are marked absent by one teacher, are not marked by another teacher. **PATH**

3. On August 14th send to your District registrar the compiled list of confirmed “No show” students for mass updating in Eklipse no later than 3:00pm. District Area Registrars will compline their area lists and submit to Betty Diaz by 4:00pm.

4. Print the following reports for verification:

A. **(Sheryl)Registration Report \_\_\_\_\_, Student No Show Report.**

B. Daily Balancing Summary, Attendance clerks print out daily. WS\OF\AT\RE\AR\DR\DB. The grand total should equal the corrected counts.

C. Enrollment Report :WS\OF\AT\RE\AR\ER -Use this report to confirme entity counts with students enrollment.

D. Suspect or Questionable Attendance Report:WS\OF\AT\RE\VR\SQ

E. The campus principal shall review, sign and submit the 1<sup>st</sup> day reports to the District Registrar no later than August 14, 2020 at 10:00am.

5. Make necessary corrections to student demographic information and/or withdrawal records to reconcile membership totals. Reprint reports as necessary. The number of students on the reports above must be identical to the grand total figure.

6. File day one reports for auditors.



**Campuses should limit the number of schedule changes during the first two days of school to emergency situations.**

***NOTE: Before attendance is posted for the first time for the school year, it is critical that ALL “No Show” students have been withdrawn and that enrollment has been verified as correct by grade level totals and names.***

## **Classroom Second Day of School Procedures**

### **On the second day of school and any day thereafter:**

1. Use Skyward to take attendance at the designated time.
2. Take attendance at the official attendance (ADA 9:30 K-8 and 9:40 9-12).
3. Document the names of any students present in your classroom at official attendance time whose names are not on the roster, but whom you accepted into class with documentation from the office. (i.e schedule). Email the Attendance Clerk and GLA with the name of students that are not on your attendance roster and are participating in your Zoom Classroom.

## **Daily Attendance Procedures**

1. Teachers begin taking attendance within the Student Management Software on August 13th.
2. The official ADA time is at 9:30 am each day for Kindergarten- 8th grade and 9:40 am for 9th grade - 12th grade. Teachers must have their attendance submitted into the Student Management Software. **THIS IS LAW.** Failure to report attendance within the allotted time could result in a formal write-up.

## **Attendance Clerk Procedures**

### **Tasks Prior to Opening of School**

1. Review the updated Membership Reporting procedures and the school district calendars.
2. Ensure teachers are able to access the class rosters in Skyward and email teachers with written instructions on how to document an absent student.
3. Verify the ADA time/period within the Student Management System. **Note: Students must arrive by 9:30 am for Kindergarten -8th grade and 9:40am for 9th grade - 12th grade to be counted as “Present” for ADA.**

### **Attendance Clerk First Day Procedures**

1. Ensure all staff is prepared for first day Attendance
2. Send reminder and Attendance 101 Flyer to teachers.
3. If a student is not present, the teacher should mark the student as absent in Skyward.
4. Be sure that teachers' attendance is posted no later than 10 minutes after official ADA time.

#### **NO SHOWS:**

- ALL STUDENTS NOT PRESENT FIRST DAY MUST BE NO SHOWN by August 14th.
- Office staff will review all posted attendance and ClassLink to determine student engagement.
- If a student's name is emailed to the Attendance Clerk and GLA this means either the student is not properly

enrolled at the campus OR the student has an incorrect schedule.

- These students SHOULD BE UPDATED not marked as “Absent” or “No Show”.
- Next step will be for office staff to review all students marked as “Absent” and were not rectified in the previous step.
- All NO SHOWS must be posted by 3:00 pm, August 14th on the Student Manager System.
- All NO SHOWS marked in the Student Management System will show a summer Entry and Withdrawal date of the first day of school. NOTE: Be sure and mark “No Show” within the comment section before submitting No Show record.

### **Attendance Clerk First Week of School Procedures**

1. A “No Show” count verification form must be submitted to the Area District Registrar on August 14th by 3:00pm.
2. Attendance must be completed and submitted by the person responsible for the ADA of that classroom (i.e.: Classroom Teacher).
3. Continue completing the Entry/Withdrawal log. This form will need to be completed each time a student Enrolls or Withdraws from the campus.

### **Reminder:**

If a student who was marked on the 1<sup>st</sup> day as a “No Show” reports on the 2<sup>nd</sup> day or thereafter, the “No Show” record should be changed to a withdrawal of the first week day of school prior to the school start day and a new Entry Record should be added with the date of the child’s first day in attendance.

### **Daily Attendance Procedures**

1. The official ADA time is at 9:30 am each day for Kindergarten-8th grade and 9:40 for 9th grade -12th grade . Teachers must have their attendance submitted into the Student Management Software. THIS IS LAW. Failure to report attendance within the 10 minute allotted time could result in a formal write-up.
2. Log any new enrollments and withdrawals.
3. On the first day of each week, reconcile the attendance by verifying absences and **ClassLink**

### **Data Integrity**

All students data - demographics, membership, absences, program eligibility, discipline, grades, etc. must be uploaded to Skyward under the individual student portfolio tab. The data about each student that is reported to PEIMS must be first posted to the Skyward Student Information System. Missing data, results in a “Fatal Error” or “Special Warnings” on PEIMS.

**District Special Programs Department will:**

Be responsible for designating all appropriate special programs coding to campus special programs designated personnel. Please refer to each special program section for initial qualification, coding and reporting to PEIMS policies.

**Campus Special Programs Designated Personnel will:**

Assess students to identify services needed, determine qualification and placement, enter the information to Skyward Student Information System depending on assessment results and/or records received from previous schools (if applicable).

**PEIMS Department will :**

- Notify campus and special program personnel of PEIMS submission deadlines and ensure compliance with submission.
- Run and Distribute copies of FSP reports to appropriate campus and special program personnel
- Special Programs personnel will verify copies of the FSP reports , campus assigned personnel will be in charge of making necessary changes to FPS - after corrections, new FSP will be sent to campus to show data accuracy prior to submission.
- The special programs designated staff will sign, date in blue or black ink, return the report with any corrections noted to PEIMS Coordinator.
- After FSP is verified, campus Attendance Clerk will obtain signatures of clean FSP report and submit to PEIMS Department.

**Membership Reporting**

All students who are physically present in school on the first day are to be counted in their respective grade level, even though they may be in a self-contained special education class. Membership figures should be shown by grade level (EE through 12), reflecting a physical count of the student present at official ADA time. Students in the auditorium, library, counselor’s office, nurse’s office, etc. at official ADA time must be documented on a roster with a teacher, counselor or administrator’s signature.

After the first day of school, membership includes all students who have enrolled and attended at least one day during the current school year and who have not withdrawn. Students who enrolled, but have not attended at least one day should not be included in the membership count.

**Reconciliation of Student Membership**

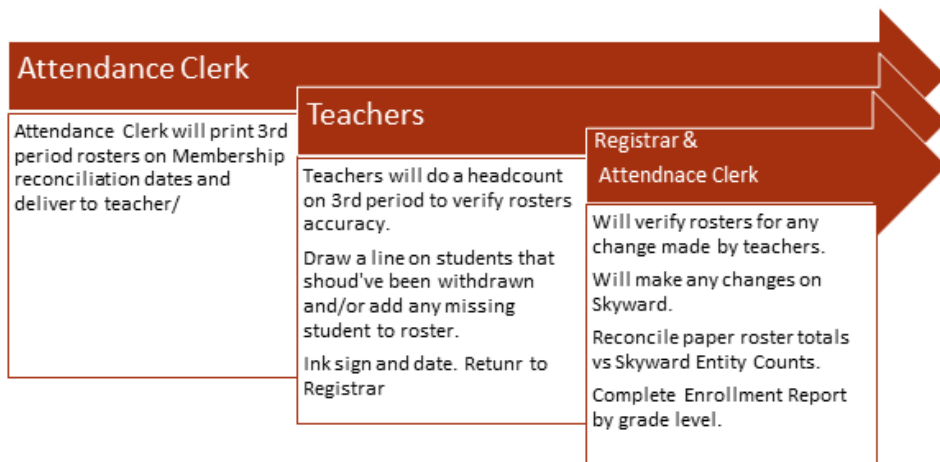
Student membership from the teacher’s roster is to be reconciled to the attendance accounting records, Skyward, at the end of the first and fourth 6-week reporting periods.

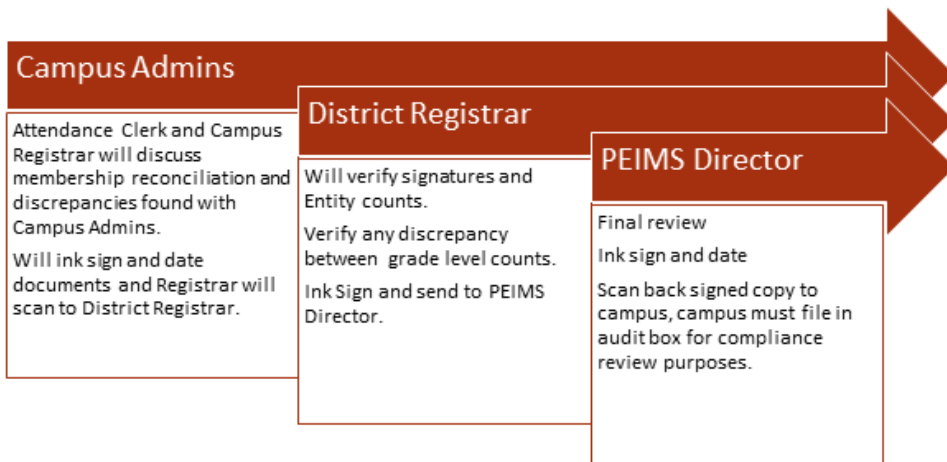
The 1st 6 weeks reconciliation is to verify that all students are reported on attendance records and that “no show” students have been purged from the attendance accounting system (Skyward) . The Teacher Membership Report (Attendance Worksheets) for 3rd period shall be used before the end of the first (1st) and fourth (4th) 6-week reporting periods to show the total number of students in membership in each teacher’s class during the official attendance period.

On the date indicated on “Attendance Timeline” of the 1st and 4th six-week cycle,

- the attendance clerk shall print and distribute the 3rd period Attendance Worksheets.
- Each teacher shall sign the Membership Report for their 3rd period respective class(es).
- The total number of students in membership shall be reconciled (by the attendance clerk and registrar) to the total number of students listed in attendance accounting records, Entity Counts report on Skyward.
- The signed Teacher Membership Reports and Enrollment Report shall be signed by each campus principal and forwarded to the District Registrar for reconciliation with the District Entity Count.
- After reconciliation, the reports shall be forwarded to the district PEIMS coordinator (Executive Director) for final review and signature. The reports shall be filed for audit purposes with the 1st and 4th six-week attendance records.

The workflow for reconciling the teacher’s roster information and attendance accounting records





**Average Daily Attendance (ADA) Rules and Exceptions**

Official ADA attendance accounting will continue to be reviewed on a six-week basis with funding determined by ADA over the full instructional year calendar. **International Leadership of Texas Charter School has designated 9:30 AM for Kinder through 8th grade and 9:40 for 9th through 12th each day as the times for ADA attendance.** All teachers must take attendance at that time. The time for attendance must be posted throughout the building, or the principal must verify that all staff members can state the time when attendance is taken to an auditor. Absences must be posted daily. Students are either present or absent at the official ADA attendance time. For official attendance accounting, “excused” and /or “unexcused” absences do not exist.

Note: Documentation must be provided in all cases where a student is not physically present at ADA time in the classroom and was counted present for Foundation School Program (FSP) ADA purposes. This includes signed and dated rosters used when a student is with other school personnel at ADA time.

**Compulsory Attendance**

Unless specifically exempted by law, those children at least six years of age and those who have not yet reached their 19th birthday are required to attend school. A student enrolled in prekindergarten or kindergarten must attend school. However, if the child has not reached mandatory attendance age (six years old by September 1 of the current school year), the parent/guardian may withdraw the student from school and the child will no longer be in violation of compulsory attendance rule. Also, a person who is age 19 or older and is enrolled in public school is required to attend school each day.

## **School Attendance Committee**

Pursuant to state law, each school campus shall have a School Attendance Committee, the composition of which shall be named by the principal. The principal shall serve as chairperson of the committee. The committee shall review petitions for class credit for students who were in attendance fewer than the number of days required for the semester or year. Also, the committee may review the records of all students whose attendance drops below the number of days required, whether or not a petition is filed.

The School Attendance Committee may grant class credit in those cases where absences are due to extenuating circumstances, and the committee may stipulate additional requirements which a student must meet in order to regain credit in a class. Final decisions about credit or promotion will be made at the end of the semester/year. The decision of the School Attendance Committee may be appealed to the Superintendent of Schools (or designee), and finally to the School Board.

## **Withdrawals**

A student can be withdrawn from school by either biological parent if no court action is involved, regardless of who enrolled the student in school, or by the person who signed the enrollment card and/or has legal custody of the student.

- Parents must complete a Student Withdraw Form. After the first week of school, if the student has been in attendance in the school for five days or more, academic grades must be recorded on the check-out sheet. All absences (excused, unexcused, and extracurricular) should be transferred with the student, so they may be recorded at the new school. A copy of the check-out sheet is given to the parent/guardian; one copy is retained by the school; and another copy is sent to the receiving school, if known, together with a copy of the report card. The parent/guardian/student should be given the original report card, and the school should retain a copy in the student's permanent folder. On the top right-hand side of the withdrawal form, write the PEIMS state ID number and highlight.
- In order to track dropouts, a parent signature and the name of the new school in which the student plans to enroll is needed. This is imperative to avoid underreported students.
- The official date of withdrawal depends on the time of day the student withdraws. If a student withdraws from school before the designated ADA time, the effective date of withdrawal is that same day. If a student completes the withdrawal process after the designated ADA time, the effective date of withdrawal that must be posted to the student's computer file is the next school day. Parents and legal guardians should be encouraged to give the school a 24- hour notice of withdrawal to allow time for the school staff to process the check- out sheet without disrupting classes.
- A student is not in membership on the withdrawal date.
- Note the effective date of withdrawal and the withdrawal code (see International Leadership of Texas Charter School Withdrawal Codes) .
- Write the applicable information on the Membership/Transaction Log using the effective date of withdrawal.
- It is critical that withdrawals be posted to the computer files on a daily basis to avoid conflicts with other schools or within the statewide TSDS file.

## **Withdrawal Procedures for Non-Attending Students**

The principal only may withdraw students for non-attendance after specific actions are taken and documented as outlined within board policy and the Parent Handbook. These actions must include



attempting to contact the student to suggest possible interventions or alternative placement to prevent the student's leaving school.

- For general education students between six and nineteen years of age, compulsory attendance laws apply. A student should not be withdrawn for non- attendance unless school personnel can document that appropriate procedures have been followed. For students in violation of compulsory attendance, a court case should be filed on the parent and/or student; and the student should be withdrawn using Withdrawal Code 98 - Other. The parent should be notified in writing of this action and informed to re- enroll the student once they regain control.
- On or after the nineteenth birthday, general education students can be withdrawn for non attendance. If the student has more than five unexcused absences in one semester, a school district may revoke the student's enrollment for the remainder of the year. Attempts to notify the parent should be documented, and a letter informing the parent and adult student of the withdrawal should be sent. The student will be counted as a dropout.

### **Attendance Best Practices**

- Have a current updated PEIMS Data Quality Manual
- Have a current TEA Student Attendance Accounting Handbook
- Attend PEIMS training offered
- Attend training for changes to Elementary/Secondary Guidelines
- Review teachers on first day procedures
- Have all new students entered into the District's Student Management System and all No-shows posted by end of the **first day**
- **After processing No Shows** run a period detail report within the Student Management System at the end of the first day, this will provide a record of all students in each class entered into Student Management System on the first day
- Generate a list of students with no homeroom number (if applicable) or schedule and verify status
- Enter Transactions on the Membership Transaction Log on a daily basis
- Enter and check absences on a daily basis
- Verify membership totals on a daily basis
- Run the **Daily Attendance Summary** to verify student's ADA Eligibility
- Check Absentee Slips (Manual Teacher/Substitute Attendance Rosters) daily for signatures in ink. File by Cycle for End of Year Documentation

- An **Attendance Change Form** that has been signed and dated by the principal or principal's designee must be kept on file when an attendance correction is made, for instance, *when a student is changed from present to absent or absent to present*; and/or when a student is not on campus at the official ADA time but can be considered in attendance for the Foundation School Program (FSP) purpose, the supportive documentation must be attached. ***File by Cycle for End of Year Documentation***
- Verify leaver codes for No-show students
- Verify that leaver codes are correct for previous year withdrawals and have supportive documentation on file

# **AT-RISK**

## **AT-RISK**

### **Program Contact and Accountability**

Angela Marcellus, Director of Student Services, [AMarcellus@ILTexas.org](mailto:AMarcellus@ILTexas.org)

### **Responsibility**

Principal shall designate appropriate campus personnel to whom all At-Risk coding questions should be directed.

Professional staff should provide data entry/clerical personnel with names and coding information, in writing, of students who are identified as at-risk and those who are being served in the program. **In no case should data entry/clerical personnel be responsible for determining whether a student is At-Risk.**

Principals must ensure that reports from the Texas Education Agency (TEA), which reflect actual Public Education Information Management System (PEIMS) data, are compared to campus reports for reasonableness and accuracy.

### **Definition**

AT-RISK-INDICATOR-CODE indicates whether a student is currently identified at risk of dropping out of school using state-defined criteria only (TEC §29.081, Compensatory and Accelerated Instruction). Please note that a student with a disability may be considered at-risk of dropping out of school only if the student meets one or more of the state at-risk criteria that is not considered to be part of the student's disability. A student with a disability is **not** automatically coded as being at risk of dropping out of school because of his/her disability. Districts should use the student's individualized education program (IEP) and other appropriate information to make the determination.

Students are **not** identified as at-risk solely because they are on free and/or reduced lunch. They must meet one of the 13 criteria listed below.

A student at-risk of dropping out of school includes each student who is under 21 years of age and who:

- is in pre-kindergarten, kindergarten or grade 1, 2, or 3 and did not perform satisfactorily on a readiness test or assessment instrument administered during the current school year;
- is in grade 7, 8, 9, 10, 11, or 12 and did not maintain an average equivalent to 70 on a scale of 100 in two or more subjects in the foundation curriculum during a semester in the preceding or current school year or is not maintaining such an average in two or more subjects in the foundation curriculum in the current semester;
- was not advanced from one grade level to the next for one or more school years; (Retained – stays with them for their entire school career) New: A student is not considered a student at risk of dropping out of school if the student did not advance from pre-kindergarten or kindergarten to the next grade level

only as the result of the request of the student’s parent;

- did not perform satisfactorily on an assessment instrument administered to the student under Subchapter B, Chapter 39, and who has not in the previous or current school year subsequently performed on that instrument or another appropriate instrument at a level equal to at least 110 percent of the level of satisfactory performance on that instrument;
- is pregnant or is a parent; (Pregnant/Parent – stays with them for their entire school career unless they are no longer pregnant or parenting)
- has been placed in an alternative education program in accordance with TEC §37.006 during the preceding or current school year;
- has been expelled in accordance with TEC §37.007 during the preceding or current school year;
- is currently on parole, probation, deferred prosecution, or other conditional release;
- was previously reported through the Public Education Information Management System (PEIMS) to have dropped out of school; (Dropout – stays with them for their entire school career)
- is a student of limited English proficiency, as defined by TEC §29.052;
- is in the custody or care of the Department of Protective and Regulatory Services or has, during the current school year, been referred to the department by a school official, officer of the juvenile court, or law enforcement official;
- is homeless, as defined NCLB, Title X, Part C, Section 725(2), the term “homeless children and youths”, and its subsequent amendments; or
- resided in the preceding school year or resides in the current school year in a residential placement facility in the district, including a detention facility, substance abuse treatment facility, emergency shelter, psychiatric hospital, halfway house, or foster group home.

At-risk data is reported in the fall PEIMS submission. Reports on PEIMS Edit+ are available to list students identified as at-risk. At-Risk Student Roster (PRF5P025) also provides information on participation in Title I and Special Education and the economic disadvantaged status of at-risk students, even though these criteria do not affect at-risk status.

**Documentation Requirements**

State Criteria	Campus Documentation Required (includes but is not limited to)
<ul style="list-style-type: none"> <li>▪ is in prekindergarten, kindergarten or grade 1, 2, or 3 and did not perform satisfactorily on a readiness test or assessment instrument administered during the current school year;</li> </ul>	<ul style="list-style-type: none"> <li>▪ Copy of readiness test or assessment instrument used to determine At-Risk status</li> </ul>
<ul style="list-style-type: none"> <li>▪ is in grade 7, 8, 9, 10, 11, or 12 and did not maintain an average equivalent to 70 on a scale of 100 in two or more subjects in the foundation curriculum during a semester in the preceding or current school year or is not maintaining such an average in two or more subjects in the foundation curriculum in the current semester;</li> </ul>	<ul style="list-style-type: none"> <li>▪ Report Card Grade (in Cumulative Record File)</li> </ul>
<ul style="list-style-type: none"> <li>▪ was not advanced from one grade level to the next for one or more school years;</li> </ul>	<ul style="list-style-type: none"> <li>▪ Evidence of Retention (in Cumulative Record File)</li> </ul>
<ul style="list-style-type: none"> <li>▪ did not perform satisfactorily on an assessment instrument administered to the student under TEC Subchapter B, Chapter 39, and who has not in the previous or current school year subsequently performed on that instrument or another appropriate instrument at a level equal to at least</li> <li>▪ 110 percent of the level of satisfactory performance on that instrument;</li> </ul>	<ul style="list-style-type: none"> <li>▪ TAKS Results</li> <li>▪ Test Record (in Cumulative Record File)</li> </ul>
<ul style="list-style-type: none"> <li>▪ is pregnant or is a parent;</li> </ul>	<ul style="list-style-type: none"> <li>▪ Life Skills Program for Student Parents Folder or Roster</li> <li>▪ Pregnancy Related Services (PRS) folder (Documentation with principal or counselor or in Cumulative Record File)</li> </ul>
<ul style="list-style-type: none"> <li>▪ has been placed in an alternative education program in accordance with</li> <li>▪ TEC §37.006 during the preceding or current school year;</li> </ul>	<ul style="list-style-type: none"> <li>▪ Sending school's Discipline records</li> <li>▪ Withdraw Form</li> <li>▪ Copy of Parent Notification (in Cumulative Record File)</li> </ul>

**DOCUMENTATION REQUIREMENTS**

State Criteria	Campus Documentation Required (includes but is not limited to)
<ul style="list-style-type: none"> <li>has been expelled in accordance with TEC §37.007 during the preceding or current school year;</li> </ul>	<ul style="list-style-type: none"> <li>Discipline Reports</li> <li>JJAEP Database</li> </ul>
<ul style="list-style-type: none"> <li>is currently on parole, probation, deferred prosecution, or other conditional release;</li> </ul>	<ul style="list-style-type: none"> <li>Note: Confidential Information</li> <li>Information may be with counselor or principal</li> <li>Sign-in sheets documenting parole officer’s visit</li> </ul>
<ul style="list-style-type: none"> <li>was previously reported through the PEIMS to have dropped out of school;</li> </ul>	<ul style="list-style-type: none"> <li>PEIMS Report</li> <li>Withdraw form</li> <li>State Dropout Report</li> <li>(in Cumulative Record File)</li> </ul>
<ul style="list-style-type: none"> <li>is a student of limited English proficiency, as defined by TEC §29.052;</li> </ul>	<ul style="list-style-type: none"> <li>LPAC Minutes</li> <li>LPAC Identification as LEP</li> <li>Documentation in LEP Folder</li> <li>Code of Y, I, or W in the LEP status field within the Student Management System</li> <li>(in Cumulative Record File)</li> </ul>
<ul style="list-style-type: none"> <li>is in the custody or care of the Department of Protective and Regulatory Services or has, during the current school year, been referred to the department by a school official, officer of the juvenile court, or law enforcement official;</li> </ul>	<ul style="list-style-type: none"> <li>Note: Confidential Information</li> <li>Information may be with counselor or principal</li> <li>Sign-in sheets documenting case worker’s visit</li> </ul>
<ul style="list-style-type: none"> <li>is homeless, as defined NCLB, Title X, Part C, Section 725(2), the term</li> <li>“homeless children and youths”, and its subsequent amendments; or</li> </ul>	<ul style="list-style-type: none"> <li>Enrollment Card – address of a shelter</li> <li>TEA Data Collection Form</li> <li>Student Residency Questionnaire (in Cumulative Record File)</li> </ul>
<ul style="list-style-type: none"> <li>resided in the preceding school year or resides in the current school year in a residential placement facility in the district, including a detention facility, substance abuse treatment facility, emergency shelter, psychiatric hospital, halfway house, or foster group home.</li> </ul>	<ul style="list-style-type: none"> <li>Enrollment Card – address of a facility (in Cumulative Record File)</li> </ul>

### **TEA Funding or Compliance Audits**

- Homeless student not coded with correct codes
- Start Date with Student Management System is invalid
- LEP/ELL students are marked as eligible regardless of grade level
- Incorrect ID numbers
- Incorrect or missing data

### **Best Practices to Ensure Data Quality for At-Risk Data**

- It is imperative that at-risk data be correct within the Student Management System for PEIMS submission. Here are information and guidelines to ensure data quality for at-risk data:
- At-Risk records are maintained by the Campus PEIMS Clerk based upon information received by the at-risk contact/coordinator.
- Schools are responsible for maintaining, verifying and updating all at-risk information for students. Most importantly, students who are at-risk must have corresponding documentation entered in the system.
- All back-up data for at-risk should be on file. A student should not be coded as at-risk if there is not any documentation for the coding.
- Please be advised that the at-risk contact/coordinator is the person responsible for the at-risk data on their campus.
- The PEIMS Clerk responsible for entering at-risk data into the SMS system must have written and signed coding instructions from the at-risk campus contact/coordinator. They are **not** to make decisions regarding coding or services. That is the responsibility of the at-risk campus contact/coordinator professional staff member.
- Services that at-risk students receive will need to be entered. Services will not be populated automatically.

**Note:** Please remember each teacher should have, in their possession, a list of the at-risk students that they teach. Teachers should be reminded that this list is confidential.



# **BILINGUAL/ESL**

## **BILINGUAL/ESL**

### **Program Contact and Accountability**

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### **Responsibility**

Principals shall designate a Bilingual/ESL Program Administrator (LPAC AP) to whom all questions related to LEP/EL, Bilingual, and ESL PEIMS coding should be directed.

The Bilingual/ESL Program Administrator should work collaboratively with the LPAC in providing data entry staff with names and coding information of LEP/EL and monitored students that reflects EL status, Program Placement, Home Language Code, Parent Permission Date/Code, and information regarding eligibility (or ineligibility) for PEIMS, which will generate EL funding.

**In no case should attendance clerk or registrar personnel be responsible for determining a student's PEIMS EL/Bilingual/ESL Indicator code.** The Bilingual/ESL Program Administrator (LPAC AP or other) is also responsible for ensuring that attendance personnel are aware of changes in student's services and effective dates of such changes. The attendance clerk and registrar personnel are then responsible for entering such changes in the detailed student attendance accounting system (manual or automated). At the end of each six-week reporting period, the Bilingual/ESL Program Administrator should verify the Student Detail Report for any coding errors.

Campus administrators are responsible for PEIMS data and will ensure that reports from the Texas Education Agency (TEA), which reflect actual Public Education Information management System (PEIMS) data, are compared to campus reports and student folder for reasonableness and accuracy.

After ALL eligibility requirements have been met for an EL/LEP student, information then is input into the Student Management System.

As soon as a student withdraws from school or the LPAC reclassifies a student as English proficient according to appropriate tests and recommends the student's exit from the bilingual education or ESL program, the student will no longer have an EL indicator code of 1. The effective date of this change should be recorded in the attendance accounting system.

At the beginning of each semester, the LPAC Administrator (AP) should verify the Student Detail Report to ensure that initial coding is correct. At the end of each six- week reporting period, the LPAC Administrator (AP) should verify the Student Detail Report to ensure that coding is correct.

Students in grades K through 8th who are counted for funding in the bilingual/ESL program must be served in a bilingual/ESL program. ILTexas has two program models of service: a) Dual Language Immersion and b) Pull out-ESL. Students in grades 6-8 must be served by Language Arts teachers who are also ESL certified. Students in grades nine through twelve are served in a Pull-out ESL program. In a Pull-out ESL program, the RLA/English teacher is ESL certified. English I for Speakers of Other Languages and English II for Speakers of Other Languages must be taught by ESL certified teachers. LPAC recommendation of services must be documented in the student’s permanent record folder. Students not served in a state required program must be served in a program approved by the Agency under an Exception or Waiver.

Students who are counted for funding in the bilingual/ESL program must have all documentation on file.

When a student is exited from the bilingual/ESL program, the LEP/EL or ESL indicator code in the attendance accounting system will be removed after the LPAC Meeting Log Panel has been updated. Not entering the correct coding will result in bilingual/ESL days accumulating when the student has been exited from the program and is no longer being served. At the end of each school year, LPACs must ensure that they are correctly reclassifying students to avoid this mistake in the future. If the LPAC did not review the student in the prior year, the district will NOT be able to claim Bilingual/ESL funding for the current school year until that LPAC review is conducted and properly documented. LPAC must clearly state ‘effective date’.

Districts shall conduct only one Home Language Survey for each student. The Home Language Survey (HLS) shall be administered to each student new to the district and to students previously enrolled in a district in Texas that was not surveyed in the past. Districts shall require that the survey be signed by the student’s parent or guardian for students in grades kindergarten through grade 8 or by the student in grades 9-12. The original copy of the survey shall be kept in the student’s permanent record.

**LPAC Data Collection/Organization**

A student’s placement in a Bilingual/ESL program is determined by the LPAC committee after review of the student’s Home Language Survey (HLS), Teacher Observations, and a review of the student’s oral and norm-referenced assessments. If a student is placed in a Bilingual/ESL program, an LPAC Assessment Folder is created for the student and maintained as part of the student’s permanent record. Documentation is uploaded to the student’s folder in Skyward (in Attachments).

**Language Proficiency Assessment Committee (LPAC) Folder**

The following contents must be included in the LPAC Folder.

- Home language survey (will be housed in student’s general folder or electronic folder in Skyward)
- Initial LPAC Paperwork
  - Home Language Survey (Skyward)
  - Parent Consent letter (may be housed in student’s general folder/Skyward)
  - LPAC Recommendation of Placement (initial or transfer) -- (LAS links and LAS battery scores are included unless enrolled as a previously identified LEP/EL student)
  - Student History Worksheet

- Middle of Year LPAC Paperwork
  - LPAC Decision for State Assessments (Eduphoria)
- End of Year LPAC paperwork
  - Report on Student Progress (uploaded to Skyward)
  - Monitoring of Exited Students (uploaded to Skyward)
  - Notification and approval of Exit (uploaded to Skyward)

**Bilingual/ESL Entry Process**

**LPAC Time Requirements**

- Within four weeks of initial enrollment, the LPAC should review documentation of student's' EL/LEP status, and recommend placement in program of service.
- Parental permission must be acquired within the four week period (if not included in enrollment paperwork).
- Identification as EL is based on LAS Links (K) and LAS (1-12).

**Initial Registration**

**Documentation Required to Support Coding-** In order to claim Bilingual/ESL eligible days present for funding, documentation must be complete. All documentation supporting student eligibility must be in the student's EL folder (and in the LPAC Documentation binder-LPAC minutes- when applicable) for every student accumulating eligible bilingual/ESL days present on the Student Detail Report. LPAC Minutes for Initial identification/Transfer ELs must be uploaded to the LPAC drive. The documentation requirements are as follows:

- Every student must have Home Language Survey (HLS) in his/her permanent folder (part of student enrollment packet).
- This includes requesting an original HLS from a previous campus (if applicable).
- Out-of-State surveys are not valid; students will have to go through the state identification and placement process if student's or family language is other than English on the HLS.

**Home Language Survey** – The home language survey shall be provided in both English/ Spanish or applicable language. The home language survey shall be translated into the home language whenever possible. Districts shall conduct only one Home Language Survey for each student. The home language survey shall be administered to each student new to the district and to students previously enrolled in a district in Texas who were not surveyed in the past. Districts shall require that the survey be signed by the student's parent or guardian for students in grades K through grade 8 or by the student in grades 9-12. The original copy of the survey shall be kept in the student's permanent record. Digital copy is permissible.

**Assessment Information** – Proof of a qualifying score on an approved OLPT (LAS links k-1st) and LAS Battery for grades 2-12. The official scores must be documented in the student's records in the LPAC minutes.

**LPAC Recommendation** – Written documentation of the recommendation for placement by the LPAC (LPAC minutes).

**Parent Consent** – Signed Parent Consent letter to place the EL student in a bilingual education or ESL program. This record must include the parent's signature and should contain a "date completed by parent" or "date received by district". Parent Consent letter is housed in the EL student's folder in Skyward.

Written documentation of the annual review and recommendation of the LPAC. Proof that a student is:

- served in a full-time bilingual instructional program by staff on permit or certified in bilingual education;
- provided instruction in ESL by staff on permit or certified in ESL or bilingual education for the amount of time accorded to English language arts in the regular instructional program;
- provided instruction as recommended by the LPAC; or
- served in a program approved by the Agency under a Bilingual Exception or ESL Waiver if applicable;
- grade books, teacher lesson plans, students' Academic Achievement Records (AAR) and/or class rosters would be acceptable documentation;

The student's permanent record shall contain documentation of all actions impacting the EL student. This documentation shall include [19 TAC §89.1220(m)]:

- the identification of the student as EL/LEP;
- the designation of the student's level of language proficiency;
- the recommendation of program placement;
- parental approval of entry or placement into the program;
- parental denial, if applicable;
- the dates of entry into, and placement within the program;
- LPAC decisions for State Assessments;
- the date of exit from the program and parent notification; and
- the results of monitoring academic success.
- the propriety of student eligibility is affirmed by the principal or superintendent when affidavits are signed.

**Timelines for Identification and Placement**

Within four weeks of his or her initial enrollment in the district, a student shall be identified as EL/LEP and enrolled into the required bilingual or ESL program. 19 TAC §89.1225(g) However, even though the student may be served in the bilingual/ESL program, LEP/EL information for a student should not be entered into the Student Management System unless all the documentation is on file. Funds for bilingual/ESL students cannot be claimed until all documentation is in place. This is audited through the EL/LEP student folder and LPAC meeting logs.

### **Required Program**

Each district that is required to offer bilingual education and special language programs shall offer the following for EL/LEP students:

- bilingual education in PK through the elementary grades;
- bilingual education, instruction or English as a second language, or other transitional language instruction approved by the agency in middle school; and
- instruction according to LPAC recommendation.

The student must be placed in a bilingual education or ESL program as soon as the student is identified as EL (through the home language survey and test scores) and the LPAC has recommended such placement, regardless of whether or not parental approval has been received. The district shall place the student in the bilingual or ESL program on the date the LPAC recommends that service begin but **may not claim funding until after parental approval is received along with home language survey, test scores, and documentation of LPAC recommendation** 19 TAC §89.1220(k). If a parental denial is received, then the district must discontinue serving the student. This is audited through review of EL student folder and LPAC meeting logs.

### **Program Service Issues for Secondary Programs**

For EL students in grades 9-12 that are newcomers, enrollment in English I for Speakers of Other Languages and/or English II for Speakers of Other Languages is appropriate. For all other EL students in grades 9-12, LPAC documentation must reflect appropriate services to meet the student's needs such as ESL designated English and content courses. English I for Speakers of Other Languages and English II for Speakers of Other Languages must be taught by ESL certified teachers. LPAC recommendation of services must be documented in the student's permanent record folder. Students not served in a state required program must be served in a program approved by the Agency under an ESL Waiver..

### **Students Tested for Eligibility/Fluent English Speakers Served in EL Programs**

All students in grades K-5 participate in the Two-Way Dual Language program offered by ILTexas either as EL (English<sub>67</sub>

learners) or EP (English Proficient) students..

### **Funding Eligibility Requirements**

A student should have a bilingual/ESL indicator recorded in the Student Management System as soon as ALL eligibility requirements have been met and a new EL record is entered into Skyward. All documentation must be on file before a record is added. The sooner documentation is on file, the sooner funds may be earned for serving the student.

### **Reclassification/Non-service Due to Withdrawal**

As soon as a student withdraws from school or the LPAC reclassifies a student as English proficient according to appropriate tests and recommends the student for exit from the bilingual education or ESL program, the student will no longer have a Bilingual or an ESL indicator code. The effective date of this change should be recorded in the attendance accounting system. At the beginning of each semester, the LPAC Administrator should verify the Student Detail Report to ensure that initial coding is correct. At the end of each six-week reporting period, LPAC Administrator should verify the Student Detail Report to ensure that coding is correct.

When a student is exited from the bilingual/ESL program, changes are made within the Student Management System by adding a new record to the LPAC Meeting Log with the correct EL/LEP Status/Program Placement, (F, S, M3, M4), etc., and the changes will be reflected in the PEIMS Coding. Not adding this record will result in bilingual/ESL days accumulating when the student has been exited from the program and is no longer being served. At the end of each school year, LPACs must ensure that they are correctly reclassifying students to avoid this mistake in the future. If the LPAC did not review the student in the prior year, the district will NOT be able to claim Bilingual/ESL funding for the current school year until that LPAC review is conducted and properly documented.

### **Eligible Days Present**

Students who are being served in the bilingual education or ESL program and are eligible for funding, according to *General Rules* and *Eligibility* earlier in this section, will be identified by a bilingual/ESL indicator code of 1 in the attendance accounting system. The total number of eligible bilingual/ESL days present must be recorded for each six-week reporting period in the Student Detail Report for every student eligible for the program.

At the end of each six-week reporting period, a Campus Summary Report (Section II) must be computed. Total eligible bilingual/ESL days present, for every student in the program, must be summarized by grade level on this report. There will be a separate Campus Summary Report for each instructional track for each campus in the district. Total Eligible Bilingual/ESL Days Present for each grade level on that campus, Total Eligible Bilingual/ESL Days Present for all grades, and Campus Bilingual/ESL ADA must be included on the Campus Summary Report.

At the end of each six-week reporting period, a District Summary Report (Section II) must be computed. The information from all Campus Summary Reports for each track in the district would be added to comprise the District Summary Report

for each track. This report must include Eligible Bilingual/ESL Days Present for each grade level in that district, Total Eligible Bilingual/ESL Days Present for all grades, and District Bilingual/ESL ADA.



# **CAREER AND TECHNICAL EDUCATION**

## **CAREER AND TECHNICAL EDUCATION**

### **Program Contact and Accountability**

Joseph Roman, Deputy Chief Academic Officer, [jroman@ILTexas.org](mailto:jroman@ILTexas.org)

\*Principals shall designate a SBEC-certified professional (counselor or assistant principal) to whom all Career and Technical Education (CTE) coding questions should be directed. Under no circumstances should the PEIMS data clerk be responsible for decision-making on issues regarding CTE PEIMS coding.

Because contact hours generate a significant amount of funds for the district, it is important that the district and state rules relative to student attendance in CTE be observed.

### **Contact Hour Eligibility**

The complete rules for reporting contact hour funding for Career and Technical Education courses can be found in Section V of the *Student Attendance Accounting Handbook* published annually by the TEA. ILTexas is responsible for ensuring that campuses are eligible for CTE contact hour funding.

1. CTE courses must have an SBEC-certified CTE teacher. (a.) A person may not be employed as a teacher, teacher intern or teacher trainee, librarian, educational aide, administrator, or counselor by a school district unless the person holds an appropriate certificate or permit as provided by Subchapter B (TEC§ 21.003 Certification Requirements) and (b) the teacher of record must be the teacher in the classroom responsible for teaching and learning, grades, attendance, etc.
2. The campus bell schedule and the school calendar must document the average number of minutes per day in the CTE class. The CTE coding must equal the total number of one-hour approved CTE class periods in which the student is enrolled.

For CTE purposes, "one-hour" refers to a class period ranging in time from 45 minutes to one hour. Usually, a half-credit semester Career and Technical Education course is taught for one class period. A one and one-half credit semester career and technical course would be taught for three class periods.

Campuses which operate on block scheduling where class periods are not in one-hour increments, should use the following chart when determining CTE codes for students.

Each CTE class must be examined separately to determine the average minutes per day students attend that class. Average minutes per day must be computed by reviewing a complete cycle of classes. For example, if a class meets on even-numbered days of the month, a two-week cycle must be reviewed. One week the class will meet on Monday, Wednesday, and Friday, and the next week the class will meet on Tuesday and Thursday. Once average minutes are determined, the applicable code is assigned to each CTE class. Then, all students attending that career and technical class are assigned the corresponding CTE code.

For students who are enrolled in more than one career and technical course, CTE codes are combined to determine the correct code assigned to each student. For example, a student is enrolled in a CTE that averages 50 minutes per day (V1) and a CTE course that averages 150 minutes per day (V3).

When the V1 and the V3 class codes are combined, the student is assigned a code of V4 in the attendance accounting system.

3. A school may only offer a class once the CTE Department has verified that the appropriate instructional resources, certified personnel, facilities, and technology are in place to teach the essential knowledge and skills intended for that course.
4. CTE student enrollment participation codes must be accurately recorded in the Student Management System section labeled CTE coding. (see attached Decision Charts – Fall and Summer)

Code 0 - not enrolled in CTE courses

Students who are not enrolled in any CTE class must have their CTE Participation code entered as 0 and the effective date is the first day of school.

Code 1 – enrolled in a CTE elective (6-12)

Any student who is enrolled in a CTE class as an elective must have a CTE Participation code of 1 and the effective date is the first day of school or the first day of their enrollment in the CTE class, whichever is later.

Code 2 – enrolled in a CTE course that is part of coherent sequence

Any student (grade 9 – 12) who plans to pursue a sequence of related CTE courses leading to a career pathway must have a signed four-year career plan of study on file before their CTE Participation Code can be entered as 2. (See sample of a four year career plan of study at the end of this chapter.)

In the event that the student does not enroll in a CTE class during a given semester, that student is still considered as a 2 unless she or he changes their plan of study. If a student’s plan of study or Academic Achievement Record does not reflect a coherent sequence of courses then that student may not be coded as a 2.

Code 3 – enrolled in a Tech Prep or Dual Credit program

Any student (grade 9 – 12) may be coded as a 3 if (a) the signed career plan of study includes one or more courses for Advanced Technical (ATC) credit and (b) the signed plan of study includes four years of high school and two years of post-secondary courses. In the event that the student does not enroll in a CTE class during a semester, that student is still considered as a 3 unless she or he changes their career plan of study. If a student’s plan of study or Academic Achievement Record does not reflect a coherent sequence of courses, then that student may not be coded as a Code 3

The CTE Participation Code of 0, 1, 2 or 3 is NOT equivalent to the CTE weight of V0, V1, V2 or etc. V- weight is

determined by the PEIMS course number, is shown in the campus Master Schedule and is directly related to the amount of weighted funding applied to that CTE course. Participation codes describe the individual student’s plan of study and do not affect campus funding. Data quality requires that both of these must be accurately maintained.

There is no V-weight attached to middle school CTE courses under normal circumstances. Only students in grades 9-12 are eligible for CTE contact hour funding, except for 7th and 8th grade students who are taught in a CTED instructional arrangement. Students in grades below 9 are not eligible for contact hours.

Students may earn CTE contact hours while they are being served in Pregnancy Related Services (PRS), Compensatory Education Home Instruction (CEHI), special education homebound (01), hospital (02), and/or state school (30) if and only if that student continues to receive the same amount and type (eye-to- eye contact) of CTE service that s/he was receiving before being placed and must be in addition to the hours served in any of these instructional arrangements.

CTE contact hours may not be claimed when students receiving CTE services are placed in disciplinary settings {i.e., In-School Suspension (ISS) or Disciplinary Alternative Education Program (DAEP)} for more than 5 consecutive days if the same amount and type of CTE services are not provided by the CTE teacher. After 5 consecutive days without CTE services being provided, the student must be removed from the PEIMS 410 record for CTE contact hours effective the first day of placement in the disciplinary setting.

This doesn’t necessarily change the student’s CTE Participation Code but the CTE weighted funding must be turned off. A CTE Override code must be entered in the detail box next to the class name on each student’s schedule. The start date is the sixth day that the student is removed from face-to-face CTE instruction. The ending date is the day that student returns to face-to-face instruction. This must be done for each CTE class in which the student is enrolled.

5. Withdrawn students require special attention to their CTE Participation Codes. Miscoding of CTE students can cause serious PEIMS errors which result in funding losses. In order to maintain data quality, the following rules apply:
  - a. If a student is withdrawing from a ILTexas secondary campus and going out-of- district then the CTE administrator may change the CTE Participation Code according to the steps below:
    1. Run a class roster for the student to see what CTE courses the students was enrolled in during this school year.
    2. Determine if the student will receive an end-of-semester average grade (i.e., a 415 record) for any CTE course in ILTexas during this school year.

3. If yes, then leave the CTE Participation Code unchanged.  
Only if the student will not receive an end-of-semester average grade for any CTE course in ILTexas during this school year should his/her CTE Participation Code be changed to 0.

6. When a student misses more than five (5) days of CTE instruction for PRS, then documentation must be shared ASAP with the campus CTE decision-maker so that vocational funding can be adjusted. Do not change the student's CTE Participation Code.

The CTE weighted funding must be turned off with a select of 'V0'. The start date is the sixth day that the student is removed from face-to-face CTE instruction. The ending date is the day that student returns to face-to-face instruction. This must be done for each CTE class in which the student is enrolled.

7. A student is not eligible to receive any CTE contact hours for participating one hour in a two hour course or for one or two hours in a three-hour course.
8. State approved CTE courses are listed in Section 4, Code Table CO22 of the Legacy PEIMS Data Standards. Courses with two or five asterisk service ID notation(s) have not been approved for the additional state CTE funding weight and should not be coded in the attendance accounting system as V1, V2, V3
  - a. Districts that offer instruction in CTE courses that are not approved for the additional state CTE funding weight do not report students served in these courses on the 410 Record (CTE- Student). However, these courses are reported on the student's PEIMS 170 record on the Fall Snapshot date. Students enrolled in grade 9-12 courses that re not approved for weighted funding must be reported on the 415 Record in Submission 3
  - b. CTE courses not approved for weighted funding are reported as PEIMS Program Intent Code 11 (Program Intent Code 22 is reserved for CTE courses eligible for weighted funding.)
9. If the campus obtains CTE department approval and the community college meets all Texas Administrative Code requirements for dual credit courses, then the campus may offer Dual Credit courses. The secondary course syllabus and textbook must correspond to the college syllabus and textbook. All students enrolled in a course resulting in dual credit for both a college course and an approved secondary CTE course are eligible to be counted for CTE contact hour funding.
10. If the CTE teacher holds a valid certificate for Advanced Technical Credit (ATC) then the campus may offer an ATC course under a separate PEIMS number. All students enrolled in a course resulting in banked college credit through an approved secondary CTE course are eligible to be counted for CTE contact hour funding.
11. Each career preparation class utilizing the work-based learning delivery arrangement must consist of student participation in work based training appropriate to the instructional program plus participation

in related CTE classroom instruction. Time spent at the training site is instructionally engaged time. Up to 120

minutes per day required time at the training stations counts towards meeting full-time and half-time attendance requirement.

The course must span the entire school year and classroom instruction must average one class period each day for every school week. Career preparation is a full year course; students are expected to be enrolled the entire school year. However, if a student transfers in at mid-year from a different campus where s/he was enrolled in career preparation, then that student may enter the course.

12. Use the following chart to determine the CTE code for unpaid students in CTE “career preparation.”
13. Use the following chart to determine the CTE code for paid students in CTE “career preparation” or for paid or unpaid students in a practicum.

The CTE code must equal the total number of one-hour approved career and technology class periods in which the student is enrolled. (Successful completion of a course is not required to receive funding.) For example, a student enrolled in a one-credit career and technology course should be coded V1. A student enrolled in three one-credit career and technology courses should be coded V3. A student enrolled in a three-credit career and technology course should be coded V3.

14. An approved, written training agreement must be on file for each student participating in work-based learning, whether paid or unpaid. A student in paid work-based instruction may be counted for contact hours on the first day of enrollment, provided that an approved training plan is on file within 15 instructional days of the student’s enrollment date.

A student participating in unpaid work-based experiences may be counted for contact hours on the first day of enrollment; a written training agreement must be approved and on-file before the student begins participating in training at the work-based learning site.

15. For a student participating in paid work-based learning experiences, employment must begin within 15 instructional days of the student’s enrollment date. If a student’s employment at an approved work site does not begin by the 16th instructional day after enrollment, the student may be placed at an unpaid work site. That unpaid training station may be at the student’s school, a nearby school, or at a public library.

If a student’s employment ends prior to the end of the school year, contact hours may be counted without interruption provided the student’s paid work-based training resumes within 15 instructional days and a written training agreement is on file within 15 instructional days of employment.

16. Teachers assigned to career preparation work-based learning experience, both paid and unpaid, must visit each student training site at least six times each school year. The teacher of record must be provided time within their schedules to visit the training sites. The training sites visits may not be conducted during the teacher’s planning and preparation period {TEC§ 21.404}. Whether the school is using 6-week or 9-week grading periods, at least one

training site visit during each student grading period is required in order to earn contact hours for that reporting period.

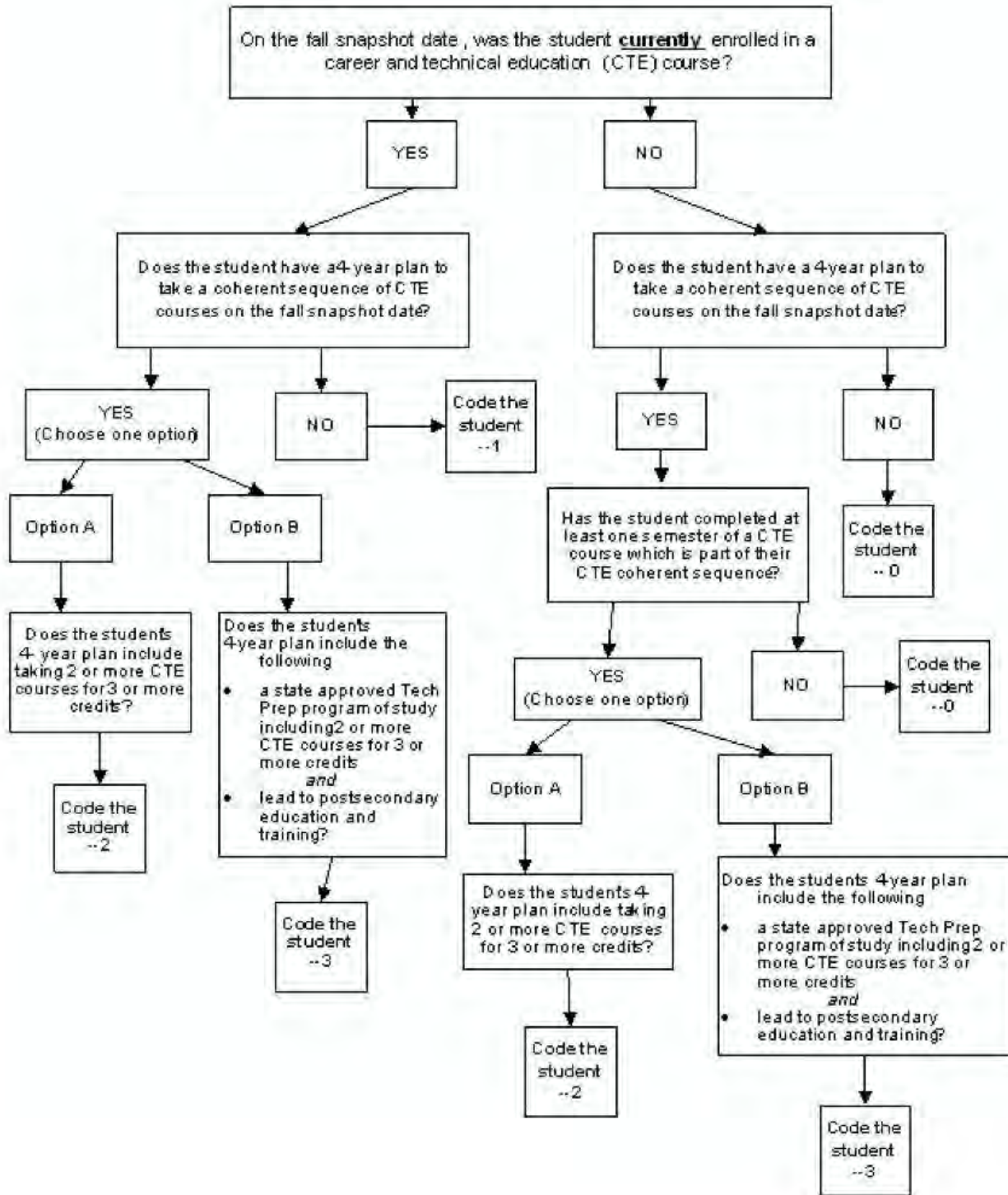
For auditing purposes, verification of the one visit per six weeks to each training station by the supervising instructor must be maintained by the Career and Technology Department.

17. Campuses that plan to offer CTE content by independent study should first seek approval from the CTE department which will refer to rules governing such instructional delivery as outlined in Section V, of the *Student Attendance Accounting Handbook*.
18. Documentation -In order to claim CTE contact hours for funding, documentation must be complete. All documents supporting students' eligibility must be on file for every student accumulating CTE eligibility days present on the Student Detail Report. Documentation requirements include but are not limited to:
  - a. adequate documentation of a student's entry into the program, services in the program, and withdrawal from the program must be available;
  - b. an approved form from TEA or authorized approval entity for magnet courses or innovative courses must be on file in order to obtain CTE funding for these courses;
  - c. signed affidavits (by the principal or designee) affirming student eligibility;
  - d. four year plans or coherent sequence of courses signed by the student listing specific CTE courses by name and number; or
  - e. documentation of a student's temporary removal from CTE (such as discipline records and CEHI records) to warrant turning off the weighted funding.



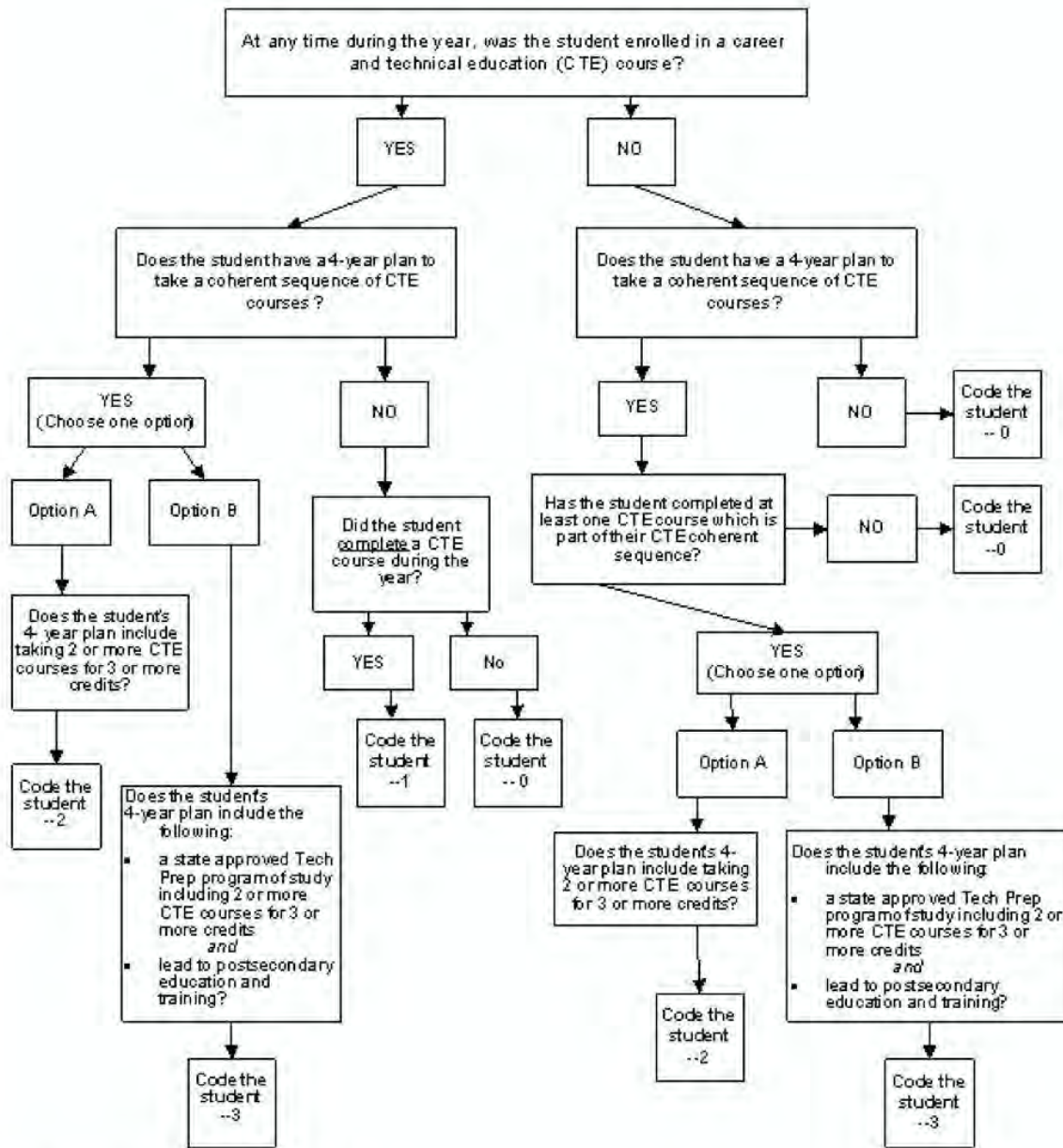


## Career and Technical Education Indicator Code Fall Decision Chart (E0031)





### Career and Technical Education Indicator Code Summer Decision Chart (E0031)



Source: Legacy PEIMS Data Standards

# **COURSE COMPLETION**

## **415 COURSE COMPLETION DATA**

### **Accountability**

Accountability for course completion data rests with the Principal of the school

Principal can designate the campus Assistant Principal to review and confirm all 415 course records being submitted.

### **General**

The information for the 415 Course Completion record is required to be tracked and reported beginning with the last Friday in October of each school year.

- In submission 3, there should be one 415 record for each student in membership in grades 1 through 12 that was enrolled in at least one course during the current school year. Multiple 415 records are used to report all of the course completion data for a student.

In submission 4, one 415 record must be submitted for each unique class (course section) that was attended during the summer (between school years) for the purpose of a student attempting to earn dual credit.

### **Minimum Reporting Standards for the 2015-2016 School Year (Submission 3)**

1. Districts and charter schools must report all courses attempted by a student as of the last Friday in October.
2. The exact STUDENT-BEGIN-DATEs and the STUDENT- END- DATEs for each class in which the student is enrolled as of the Last Friday in October must be reported. For example, if a student started a semester with Biology I and changed to a different course such as Theatre on November 1st, then both the Biology I and the Theatre course must be reported on a 415 record along with the actual STUDENT-BEGIN- DATEs and the STUDENT-END- DATEs for each class.
3. Classes completed prior to the fall snapshot date must also be reported along with the classes completed after the fall snapshot date.
4. Locally developed courses such as the special education 9XXXXXXX series and the locally developed 8XXXXXXX series courses are not reported.
  - For submission 3, CAMPUS-ID-OF-ENROLLMENT identifies the campus that scheduled the student for a particular course section and where the student was enrolled while taking the course.
  - For submission 4, CAMPUS-ID-OF-ENROLLMENT identifies the campus that scheduled and/or awarded the high school credit for the dual credit course the student attempted in the summer between school years.

- The COURSE-SEQUENCE-CODE identifies how the course was taught to the student during the school year, or in the summer.
- COURSE-GRADE and FINAL-COURSE-GRADE are only reported for courses taken for high school credit. This includes high school courses taken in middle school and dual credit courses.
- COURSE-COMPLETION-INDICATOR indicates whether or not the student finished the full sequence of instruction for a course. If the COURSE-COMPLETION-INDICATOR is “1”, it does not mean that the student met all of the requirements to receive credit or a grade for the course.
- Do not include audited courses or courses taken for local credit only.
- Do not include courses with SERVICE-IDs that begin with SA, SR, SS, 01, 8, or 9.
- If a student repeats a course during the year with different outcomes, each course completion is to be reported.
- The 415 record must reflect the PASS/FAIL-CREDIT-INDICATOR-CODE determined at the end of the course. For example: A student completes the first half of Chemistry, a two-semester course. The course was failed, no credit was received (Code “02”). The second semester, this student completed the second half of Chemistry. The course was passed and credit was received (Code “01”). The district averages the grades earned in each half of the course to determine if course credit should be received. In this example, the average grade was passing. The 415 record should reflect a PASS/FAIL-CREDIT-INDICATOR-CODE of “08” (course was failed but credit was received) for the first half of Chemistry. Therefore, the Code “02” originally recorded must be changed to Code “08”.

If a student leaves and returns to the same course section for a particular class during the school year, only one of the 415 records for that course section may be reported with a Course Completion Indicator of “1”. This rule is enforced by a fatal edit.

Additionally, if a student leaves and returns to the same course section for a particular class during the school year, only one of the 415 records for that course section may be

reported with a Pass Fail Credit Indicator Code other than “00”. This rule is enforced by a fatal edit.

- CLASS-ID-NUMBER and SERVICE-ID identifies the unique number assigned to a particular course section at the campus level and must match a 300 Course Section record.
- For submission 3, STUDENT-BEGIN-DATE identifies the first date a student was assigned to the class in the current school year. For submission 4, STUDENT-BEGIN-DATE identifies the date the dual credit course began.
- For submission 3, STUDENT-END-DATE identifies the last date a student was assigned to the class in the current school year. For submission 4, STUDENT-END-DATE identifies the date the dual credit course ended.

- A DUAL-CREDIT-INDICATOR-CODE of 1 is reported only when a student is eligible to receive both high school and college credit for a SERVICE-ID listed in C022. Advanced Placement courses taken at the high school are not to be reported as dual credit.
- The ATC-INDICATOR-CODE indicates a high school course for which college credit may be awarded by a post-secondary institution under the conditions of a local articulation agreement or the statewide Advanced Technical Credit (ATC) program agreement. For submission 4, the ATC- INDICATOR-CODE must be “0”.
- Dual Credit courses are not to be reported as local or statewide articulated (ATC) credit. Likewise, ATC courses are not to be reported as dual credit courses. These rules are enforced by fatal edits.
- COLLEGE-CREDIT-HOURS collects the number of college hours that a student earned while taking a dual credit course. This field will have values ranging from 0 to 3. If a student takes a dual credit course and does not complete the course, then the COLLEGE-CREDIT-HOURS will be reported as 0.

# **DISCIPLINE**



# DISCIPLINE

## Accountability

Accountability for discipline rests with the Principal of the school. Principals must ensure that reports from the Texas Education Agency (TEA), which reflect actual Public Education Information Management System (PEIMS) data, are compared to locally-produced reports for reasonableness and accuracy.

## Disciplinary Role of ILTEXAS Staff

**TEACHERS** are authorized to assign Lunch Detention and Classroom Detention. Classroom Detention by a teacher must be scheduled with the parent and coordinated with the Grade Level Administrator. Teachers will work to determine why the student misbehaved and to help the student learn to make better choices in similar future situations.

**THE GRADE LEVEL ADMINISTRATOR (GLA)** is authorized to handle student discipline and may assign and supervise **ASD** of up to 90 minutes to help the student learn to make better choices in similar future situations.

**THE ASSISTANT PRINCIPAL** or designee is authorized to enforce discipline and to investigate any allegation of misconduct. The **AP** may question any witnesses in addition to the offending student and may ask for written statements that may include time, date, circumstances, observations, and signature.

**THE AP** may assign any of the disciplinary consequences described on the **ILTEXAS “Student /Parent Handbook and Code of Conduct”** and is authorized to supervise **ASD**, up to 90 minutes of physical exercise that may include students walking 3 miles (20 minute pace), cleaning desks, campus beautification efforts, or other relevant duties as assigned. Additionally, the **AP** may assign In-School-Suspension (**ISS**) and/or Out of School Suspensions (**OSS**) for up to five (5) days. The **AP** will attempt to reach a parent by phone and follow-up with an email notification to the parent of **ISS** dates.

**THE CAMPUS PRINCIPAL** has the authority to implement the Code of Conduct, up to and including the suspension of a student from campus. **The Campus Principal** may also assign any of the disciplinary consequences described on the **ILTEXAS “Student /Parent Handbook and Code of Conduct”** and may recommend a student for expulsion.

## Disciplinary Action Data – Student

All disciplinary events must be documented on skyward. Every disciplinary **referral** must be converted into an **offense**. Once a referral has been converted to an offense; it must be marked as **“served”**, whenever the student has served the total time assigned. Details to a disciplinary action are only visible to parents, through **“Family Access”**, once the **referral** has been converted to **offense**.

When a student is assigned **OSS, ISS or any other disciplinary action**, the incident must be marked as **“served”** upon the student returning to the regular classroom environment. If for any reason, the student could not serve the total days/time assigned, an appropriate **“Difference Reason Code”** must be added to the disciplinary incident.

Discipline records are reported to **PEIMS** at the end of the current school year, and are a part of the **PEIMS** Submission 3. However, all disciplinary records must be accurate and **“Fatal Free”** through the current school year.

A discipline record is required for each disciplinary action taken against any student which results in the removal from his regular classroom for any part of a day or when truancy charges have been filed against a student and/or his parents. A single student will have multiple discipline records if removed from his classroom more than once and will be categorized in one of the following general categories: In-School Suspension (**ISS**), Out-of-School Suspension (**OSS**).

When an incident has “Action Reason Code” **41 “FIGHTING/MUTUAL”**, two or more students must be listed as part of the incident. When two or more students are part of the same incident, regardless of the “Action Reason Code”, the same incident number must be assigned to all students involved.

Multiple violations are sometimes committed in the course of one disciplinary event. When completing a discipline record, only the offense code representing the most serious violation should be entered on a discipline record. **NOTE: DO NOT MAKE MULTIPLE ENTRIES FOR THE DISCIPLINE REASON (OFFENSE) CODE.**

The ILTEXAS **“Student/Parent Handbook and Code of Conduct”** provides legal and locally established definitions, and is intended to assist in understanding terms related to the Code of Conduct. Personnel responsible for discipline coding should refer to the **“Discipline”** section of the ILTEXAS **“Student/Parent Handbook and Code of Conduct”** when determining appropriate **PEIMS** discipline coding and appropriate disciplinary actions (consequences.)

All student discipline records shall be recorded in the district discipline tracker **“Skyward”**. Records for disciplinary infractions may be entered in by the classroom teacher, office personnel, or school administration. Classroom teachers may enter infractions as classroom referrals. However, administrators should be cognizant that they—not clerical staff—are responsible for documenting the coding. **In no case should data entry/clerical personnel be responsible for determining disciplinary coding.** An administrator may convert a teacher referral into an offense and/or enter a referral. Offenses may be viewed by a parent through Skyward **“Family Access Portal”**. Parent contact must be made by the teacher and or administrative staff when entering a discipline record. Designations of discipline coding should include either the local coding or two-digit **PEIMS** discipline offense, consequences, and appropriate dates. Schools should use a discipline referral form with all required **PEIMS** elements.

### **Guidelines Regarding Offenses**

Permanent removal by a teacher from class (disciplinary-action-reason-code 01) under TEC §37.002(b) is a serious offense and is limited for use in those situations where the teacher has refused re-admittance of the student to that teacher’s class. Otherwise, if the teacher allows re-admittance of the student to the class, then **PEIMS** offense code **“21-Violation of Student Code of Conduct”** should be used.

Charter Schools are not subject to expulsion requirements as outlined and required by public schools in TEC §37.002. A chart of mandatory DAEP and Expulsion placement is provided for reference and to aid in local decisions as directed by the Charter School’s board. The only exception is if a student brings a gun or firearm to school. This incident falls under TEC §37.007(e) stating:

*In accordance with 20 U.S.C. Section 7151, a local educational agency, including a school district, home-rule school district, or open-enrollment charter school, shall expel a student who brings a firearm, as defined by 18 U.S.C. Section 921, to school.*

**Retention of Disciplinary Records**

**NOTE:** “TEC §37.017 Destruction of Certain Records” states information received by a school district under Article 15.27, Code of Criminal Procedure, may not be attached to the permanent academic file of the student who is the subject of the report. The school district shall destroy the information at the end of the school year in

which the report was filed. In light of this requirement to destroy information received under Article 15.27, Code of Criminal Procedure, the district must retain documentation other than the information received under Article 15.27, Code of Criminal Procedure to support the discipline data submitted on the 425 record for a period of 5 years.

### DISTRICT OFFENSE CODES

Offense Codes				
Views: <b>General</b> ▼		Filters: <b>*Active Offense Codes</b> ▼		
Code ▲	Long Description	Status*	Severity	State Code
▶ 01	DISRUPTIVE BEHAVIOR		1	21
▶ 02	CONDUCT PUNISHABLE AS FELONY		1	02
▶ 03	CHEATING PLAGARISM		1	21
▶ 04	CONTROLLED SUBSTANCE		1	04
▶ 05	ALCOHOL POSSES/USE/SOLD		1	05
▶ 06	ABUSE GLUE/AEROSOL		1	06
▶ 07	PUBLIC LEWDNESS INDECENT EXP		1	07
▶ 08	RETALIATION SCHOOL EMPLOYEE		1	08
▶ 09	OFF CAMPUS FELONY TITLE 5		1	09
▶ 10	OFF CAMPUS CONDUCT		1	10
▶ 11	FIREARM USED EXHIBITED POSSES		1	11
▶ 12	ILLEGAL KNIFE		1	12
▶ 13	ILLEGAL CLUB		1	13
▶ 14	PROHIBITED WEAPON		1	14
▶ 16	ARSON		1	16
▶ 17	MURDER		1	17
▶ 18	INDECENCY WITH A CHILD		1	18
▶ 19	AGGRAVATED KIDNAPPING		1	19
▶ 21	CONDUCT CODE VIOLATION		1	21
▶ 22	CRIMINAL MISCHIEF		1	22
▶ 23	EMERG PLACEMENT		1	23
▶ 26	TERRORISTIC THREAT		1	26
▶ 27	ASSAULT ILT EMPLOYEE		1	27
▶ 28	ASSAULT NON ILT EMPLOYEE		1	28
▶ 29	AGGRAVATED ASSULT EMPLOYEE		1	29
▶ 30	AGGRAVATED ASSAULT NON ILT		1	30
▶ 31	SEX ASSULT EMPLOYEE		1	31
▶ 32	SEX ASSULT NON ILT		1	32
▶ 33	TOBACCO		1	33
▶ 34	GANG ACTIVITY		1	34
▶ 35	FALSE ALARM/REPORT		1	35
▶ 36	FELONY CONTROLLED SUBSTANCE		1	36
▶ 37	FELONY ALCOHOL VIOLATION		1	37
▶ 41	FIGHTING/MUTUAL		1	41
▶ 42	TRUANCY PARENT		1	42
▶ 43	TRUANCY 3 UNEXCUSED ABSENCES		1	43
▶ 44	TRUANCY 10 UNEXCUSED ABSENCES		1	44
▶ 45	FAILURE TO ENROLL		1	45
▶ 46	AGGRAVATED ROBBERY		1	46
▶ 47	MANSLAUGHTER		1	47
▶ 48	CRIMINALLY NEGLIGENT		1	48
▶ 49	DEADLY CONDUCT		1	49
▶ 50	NON-ILLEGAL KNIFE		1	50
▶ 55	REGISTERED SEX OFFENDER COURT		1	55
▶ 56	REGISTERED SEX OFFENDER		1	56
▶ 57	CONTINUOUS SEXUAL ABUSE		1	57

**DISTRICT OFFENSE CODES - Cont.**

▶ 58	BREACH OF COMPUTER SECURITY			1	58
▶ 59	SERIOUS MISBEHAVIOR			1	59
▶ 60	ACADEMIC DISHONESTY			1	21
▶ 62D	BULLY/CYBERBULLYING DISABILITY			1	21
▶ 62E	BULLY/CYBERBULLYING ETH/RACE			1	21
▶ 62G	BULLY/CYBERBULLYING GENDER			1	21
▶ 62S	BULLY/CYBERBULLYING SEXUAL ORI			1	21
▶ 63	CELL INFRACTION			1	
▶ 64	ROBBERY/THEFT			1	21
▶ 65	DRESS CODE INFRACTION			1	
▶ 66	INAPPROPRIATE USE OF TECH			1	21
▶ 67	INSUBORDINATION			1	21
▶ 68	LUNCH BEHAVIOR 1,2,3 INFRAC			1	
▶ 69	NO SHOW DORM DETENTION			1	
▶ 70	NO SHOW DRESS CODE DETENTION			1	21
▶ 71	NO SHOW EAGLE ACADEMY			1	21
▶ 72	NO SHOW TO DETENTION			1	21
▶ 73	NO SHOW TO WORKOUT DETENTION			1	21
▶ 74	PDA			1	21
▶ 75	PROFANITY			1	21
▶ 76	REFUSING TO ACCEPT DISCIPLINE			1	21
▶ 77	SKIPPING CLASS			1	21
▶ 78	STEALING FROM STUD, STAFF, SCH			1	21
▶ 79	THREATS STUDENT ON PER/FACULTY			1	21
▶ 80	THREATS STUDENT TO STUDENT			1	21
▶ 81	VIOLATING GROOMING STANDARDS			1	
▶ C1	DISPLAYING CHAR COURAGE			1	
▶ C10	DISPLAYING CHAR LEADERSHIP			1	
▶ C11	DISPLAYING CHAR OPTIMISM			1	
▶ C12	DISPLAY CHAR SOC INTELLIGENCE			1	
▶ C2	DISPLAYING CHAR CREATIVITY			1	
▶ C3	DISPLAYING CHAR CURIOSITY			1	
▶ C4	DISPLAYING CHAR ENERGY/ZEST			1	
▶ C5	DISPLAY CHAR FOCUS SELF -CONT			1	
▶ C6	DISPLAYING CHAR GRIT			1	
▶ C7	DISPLAYING CHAR HUMILITY			1	
▶ C8	DISPLAYING CHAR INITIATIVE			1	
▶ C9	DISPLAYING CHAR INTEGRITY			1	
▶ EA	EAGLE ACADEMY			1	
▶ L.1	L0.01 HALLWAY TRANSITIONS			1	
▶ L.2	L0.03 RECESS BEHAVIOR 1,2,3 IN			1	
▶ L.4	L0.04 EXCESSIVE ABSENCES			1	21
▶ L.5	L0.05 ACADEMIC CONCERN			1	
▶ L.6	L0.06 LEAD			1	
▶ L.7	L0.07 MODEL BEHAVIOR			1	
▶ L4	L0.04 EXCESSIVE TARDY			1	21
▶ OTH	OTHER NOT LISTED-TEACHER REF			1	

## DISTRICT ACTION CODES

Action Codes							
Views: <b>General</b>   Filters: *Active Action Codes							
Code ▲	Short Description	Long Description	Status*	Time	Severity	Suspension Type	State Code
01	EXPUL W/O PLACE	EXPULSION W/O PLACEMENT	Active	0 Days	1	Expulsion	01
05	OUT SCH SUSPENS	OUT OF SCHOOL SUSPENSION	Active	0 Days	1	Out of School	05
06	IN SCH SUSPENSI	IN SCHOOL SUSPENSION	Active	0 Days	1	In School	06
1.1	CAFETERIA DUTY	CAFETERIA DUTY	Active	0 Hours	1	None	
1.2	CLASSROOM DET	CLASSROOM DETENTION	Active	0 Hours	1	None	
1.3	CLASSROOM HELP	CLASSROOM HELPER	Active	0 Hours	1	None	
1.4	COUNSEL W/STU	COUNSEL WITH STUDENT	Active	0 Hours	1	None	
1.5	DET AFTER SCH	DETENTION AFTER SCHOOL	Active	0 Hours	1	None	
1.6	DETENTION	DETENTION MORN, LUNCH, AFT SCH	Active	0 Hours	1	None	
1.7	DISMISSAL HELP	DISMISSAL HELPER	Active	0 Hours	1	None	
1.8	DORM DETENTION	DORM DETENTION	Active	0 Hours	1	None	
1.9	DRESS CODE DET	DRESS CODE DETENTION	Active	0 Hours	1	None	
10.	EA-LUNCH	EAGLE ACADEMY LUNCH	Active	0 Hours	1	None	
11.	EAGLE BUCKS	EAGLE BUCKS	Active	0 Hours	1	None	
12.	EAGLE ACADEMY	EAGLE ACADEMY	Active	0 Hours	1	None	
13.	E-MAIL TO PAR	E-MAIL NOTICE TO PARENT	Active	0 Hours	1	None	
15.	GRADE REDUCTION	GRADE REDUCTION FOR CHEAT/PLAG	Active	0 Hours	1	None	
16	TRUANCY FINE	TRUANCY FINE ASSESSED	Active	0 Days	1	None	16
17	TRUANCY NO FINE	TRUANCY NO FINE ASSESSED	Active	0 Days	1	None	17
19.	MORNING HELPER	MORNING HELPER	Active	0 Hours	1	None	
20.	MORNING TUTOR	MORNING TUTORIALS	Active	0 Hours	1	None	
21.	OFFICE AIDE	OFFICE AIDE	Active	0 Hours	1	None	
24.	PAR-ADMIN CONF	PARENT ADMIN CONFERENCES	Active	0 Hours	1	None	
25	PART DAY OSS	PARTIAL DAY OSS	Active	0 Days	1	None	25
26	PART DAY ISS	PART DAY ISS	Active	0 Days	1	None	26
27.	PHYSICAL ACT	PHYSICAL ACTIVITY	Active	0 Hours	1	None	
28.	RECOMMEND EXP	RECOMMENDATION OF EXPULSION	Active	0 Hours	1	None	
29.	RECOMMEND SUS	RECOMMENDATION OF SUSPENSION	Active	0 Hours	1	None	
30.	REFERRAL TO ADM	REFERRAL TO ADMINISTRATION	Active	0 Hours	1	None	
31.	REFERRAL TO GLA	REFERRAL TO GLA	Active	0 Hours	1	None	
32.	REFERRAL O/S AG	REFERRAL TO OUTSIDE AGENCY	Active	0 Hours	1	None	
33	Lunch Detention	Lunch Detention with the GLA	Active	.5 Hours	1	None	
34.	REWARDS POINTS	REWARDS POINTS	Active	0 Hours	1	None	
35.	SATURDAY DET	SATURDAY DETENTION	Active	0 Hours	1	None	
36.	SATURDAY TUTOR	SATURDAY TUTORING	Active	0 Hours	1	None	
37.	SCHOOL PROB	SCHOOL PROBATION	Active	0 Hours	1	None	
38.	SEATING CHANGES	SEATING CHANGES IN CLASS	Active	0 Hours	1	None	
39.	SHORT-TERM REM	SHORT-TERM REMOVAL	Active	0 Hours	1	None	
40.	SST REFERRAL	SST REFERRAL	Active	0 Hours	1	None	
41.	TEMP CONFIS	TEMPORARY CONFISCATION	Active	0 Hours	1	None	
42.	TIMEOUT	TIMEOUT	Active	0 Hours	1	None	
45.	WORKOUT DET	WORKOUT DETENTION	Active	0 Hours	1	None	
46.	VERBAL WARNING	VERBAL WARNING	Active	0 Hours	1	None	
47.	WITHDRWL OF PRI	WITHDRAWAL OF PRIVILEGES	Active	0 Hours	1	None	
48.	WORKOUT MOR DET	WORKOUT MORNING DETENTION	Active	0 Hours	1	None	
50	EXP/NO PLAC/SED	EXPUL/NO PLACEMENT/SP ED	Active	0 Hours	1	Expulsion	50
55	HALL MONITOR	HALL MONITOR	Active	0 Hours	1	None	
56	PAR TEACH CONF	PARENT TEACHER CONFERENCE	Active	0 Hours	1	None	
57	PHONE CALL PAR	PHONE CALL TO PARENT	Active	0 Hours	1	None	
58	REFLECTION ESSY	REFLECTION ESSAY	Active	0 Hours	1	None	
99	OTHER	OTHER	Active	0 Hours	1	None	
ASD	AFTER SCH DIS	AFTER SCHOOL DISCIPLINE	Active	0 Hours	1	None	
mea	Mandatory Eagle	Mandatory Eagle Academy	Active	1 Hour	1	None	
TDE	TARDY DETENTION	TARDY DETENTION	Active	0 Hours	1	None	



## Expulsion Procedure

### General Education student is expelled (usually, these are made final):

Within 24 hours after receiving the Hearing Officer's Notice of Decision from the Area Superintendent's Office, if the Decision includes an order to expel the student, the Campus Registrar will:

- Add or update the leaver code to "78, expelled, cannot return" in the student's Entry/Withdrawal history.
- Process the withdrawal paperwork in Skyward according to the expulsion effective date as stated in the Notice of Decision.
- Update Eklipse to reflect that the student was expelled, entering a note stating the length of expulsion.

Within 24 hours of receiving the Hearing Officer's Notice of Decision from the Area Superintendents Office, if the Decision includes an order to expel the student, the District PEIMS & Compliance Specialist will add the disciplinary action code "01, Expulsion Without Placement" to the student's discipline history and will notify the student's home District by email.

### SPED or 504 student is ordered expelled and expulsion order is non-final because MDR is Pending:

Within 24 hours after receiving the Hearing Officer's Notice of Decision from the Area Superintendents Office, if the Notice of Decision or any other communication makes it clear that the student is classified as SPED or 504, and the Decision includes an order to expel the student:

The Principal will notify the Special Populations Coordinator and the SPED or 504 Case Manager of the Decision and of the pending MDR/ARD.

Within 24 hours after the conclusion of the MDR/ARD, the Principal will share the Manifestation Determination with the Area Superintendent, the Area Office Administrative Assistant, the Hearing Officer, the District PEIMS & Compliance Specialist, other campus administrators, the Campus Registrar, and Legal. Principal will explicitly state how the Manifestation Determination affects the expulsion order that had been non-final.

Within 24 hours after receiving the results of the evaluation, the District PEIMS & Compliance Specialist will update the student's Disciplinary Record and **Leaver Code** as needed to indicate the student's correct status: if the expulsion order is made final, then 01, Leaver Code 78; if the expulsion order remains non-final, then Leaver Code 98 or other appropriate code, but not 78. See discussion below of these situations.

### Child Find student is "expelled," (a General Education student was ordered expelled, order made non-final awaiting an evaluation because someone suspected a need to determine SPED or 504 eligibility before carrying out a change of placement):

Within 24 hours after receiving the Hearing Officer's Notice of Decision from the Area Superintendents Office, if the Notice of Decision or any other communication makes it clear that an evaluation to determine eligibility for SPED or 504 has been scheduled or requested, and the Decision includes an order to expel the student, the Principal will notify the Special Populations Coordinator and the SPED or 504 Case Manager of the Decision and of the need for evaluation.

Within 24 hours after the conclusion of the evaluation, the evaluation team and the Principal must share the evaluation results with the Hearing Officer, the Area Superintendent, the District PEIMS & Compliance Specialist, the Campus Registrar, and Legal.

Within 24 hours after receiving the results of the evaluation, the District PEIMS & Compliance Specialist will update the student's Disciplinary Record and **Leaver Code** as needed. See discussion below of these situations.



**Non-final expulsion is made final:**

Within 24 hours after determining that a previously non-final expulsion is made final, the person making such determination will notify the Hearing Officer, the Area Superintendent and the Area Office Administrative Assistant of the decision and the grounds for the decision. Here are the ways this can happen:

- MDR/ARD determines the misconduct was not linked to an underlying disability or special needs, nor to the school’s failure to serve or accommodate. The Principal notifies the above persons that the previous order to expel the student is to be made final because of this Manifestation Determination.
- Someone called for an Evaluation (for SPED or 504 eligibility) of a General Education student who was ordered expelled. We made the expulsion order non-final in order to have an Evaluation. However, the parent or guardian refused to give consent for the Evaluation. The Principal, or other person who receives this information, notifies the above persons that the previous order to expel the student is to be made final, because the student’s General Education status remains unchallenged due to lack of parental consent for Evaluation.
- Evaluation finds a student who was ordered expelled not eligible for SPED or 504 services. Thus, the student’s General Education status is confirmed and the expulsion order should be made final. The Principal and the Evaluation team notify the above persons that the previous order to expel the student is to be made final because the student has been confirmed to be a General Education student.

Within 24 hours after learning of a determination that a non-final expulsion has been made final, the Area Office Administrative Assistant will draft a letter to the student’s parent or guardian notifying him/her that the expulsion is made final and that the parent or guardian should immediately visit the campus and complete the paperwork to facilitate the student’s transfer to another school. CC to the Campus Registrar, Area Registrar, District PEIMS Specialist, and Legal.

Within 24 hours after receiving the Hearing Officer’s Notice of Decision from the Area Superintendent’s Office, if the Decision includes an order to expel the student, the Campus Registrar will:

- Add or update the leaver code to “78, expelled, cannot return” in the student’s Entry/Withdrawal history.
- Process the withdrawal paperwork in Skyward according to the expulsion effective date as stated in the Notice of Decision. However, if the expulsion took place after ADA appointed time, the withdrawal will be effective on the next school day.
- Update Eklipse to reflect that the student was expelled, entering a note stating the length of expulsion.

**Non-final order of expulsion remains non-final:**

Within 24 hours after determining that a previously non-final expulsion will remain non-final, the person making such determination will notify the Hearing Officer, the Area Superintendent, the Area Office Administrative Assistant, and Legal of the decision and the grounds for the decision. Examples:

- MDR/ARD determines the misconduct was linked to an underlying disability or special need or to the school’s failure to serve or accommodate. The Principal notifies the above persons that the previous order to expel the student is to remain non-final because of this Manifestation Determination.
- An Evaluation (for SPED or 504 eligibility) was called for due to concerns regarding a General Education student who was ordered expelled. We made the expulsion order non-final in order to have an Evaluation. The student was found to be eligible

for SPED services or a 504 accommodation. The Principal, or other person who receives this information, schedules MDR/ARD as needed to make a Manifestation Determination regarding the misconduct that led to the expulsion. The Principal notifies the above persons that the previous order to expel the student will remain non-final at least until MDR/ARD is conducted, because there is now a basis for conducting MDR/ARD.

Within 24 hours after determining or learning that a non-final expulsion is to remain non-final, the Area Office Administrative Assistant will draft a letter to the student's parent or guardian notifying him/her that the expulsion will remain non-final until the MDR/ARD produces a Manifestation Determination. CC to the Campus Registrar, Area Registrar, District PEIMS Specialist, and Legal.

Within 24 hours after receiving the Hearing Officer's Notice of Decision from the Area Superintendent's Office, if the Decision includes an order to expel the student, the Campus Registrar will:

- Ensure that the Leaver Code does not indicate expulsion in the student's Entry/Withdrawal history.
- Update Eklipse, if necessary, to reflect that the student remains enrolled.

**Expulsion held in abeyance is made final due to violation of a condition:**

Within 24 hours after determining that an expulsion which was held in abeyance should be made final, the Principal making such determination will notify the Hearing Officer, the Area Superintendent and the Area Office Administrative Assistant of the determination and of the grounds for it and will request that the student be ordered removed from ILTexas.

Within 24 hours after learning of a determination that a non-final expulsion has been made final, the Area Office Administrative Assistant will draft a letter to the student's parent or guardian notifying him/her that the expulsion is made final and that the parent or guardian should immediately visit the campus and complete the paperwork to facilitate the student's transfer to another school. CC to the Campus Registrar, Area Registrar, District PEIMS Specialist, and Legal.

Within 24 hours after receiving the Hearing Officer's Notice of Decision from the Area Superintendent's Office, if the Decision includes an order to expel the student, the Campus Registrar will:

- Add or update the leaver code to "78, expelled, cannot return" in the student's Entry/Withdrawal history.
- Process the withdrawal paperwork in Skyward according to the expulsion effective date as stated in the Notice of Decision. However, if the expulsion took place after ADA appointed time, the withdrawal will be effective on the next school day.

Update Eklipse to reflect that the student was expelled, entering a note stating the length of expulsion.

# **ECONOMICALLY DISADVANTAGED**

# **ECONOMICALLY DISADVANTAGED/FREE AND REDUCED LUNCH**

## **Program Contact and Accountability**

Yolanda Banks, Director of Child Nutrition, [ybanks@iltexas.org](mailto:ybanks@iltexas.org)

Esther Galvan, Administrative Assistant, [egalvan@iltexas.org](mailto:egalvan@iltexas.org)

## **Definition**

International Leadership of Texas Charter School has agreed to participate in the National School Breakfast and Lunch Programs and accepts responsibility for providing free and reduced-price meals to eligible children in its schools under its jurisdiction.

The administrator is responsible for the identification of students who are approved by the Child Nutrition Department, based on Federal Income Guidelines, the assurance students are being served and the orderly maintenance of the supporting documentation.

## **Eligibility**

All students have access to Free and Reduced Meal applications. Approved application data will be provided by Nutri-Apps. Applications are reviewed by the Student Eligibility and Accountability (SEA). NSLP policies, rules and procedures are used to determine the student's eligibility. The federal and state requirements are detailed in the *Policy Statement* and the *Contact Person Training Manual*.

## **Auditing**

At the end of the six-week recording period, the Child Nutrition staff will verify reports within the Mosaic System for any coding errors. It is suggested that queries be run on a regular basis to check for reasonableness and accuracy.

Records must be kept on a current basis and routinely analyzed. The district may verify questionable applications at any time. SEA is required to verify a number of approved free and reduced-price meal applications. The administration will issue detailed instructions on the verification procedure at the proper time.

Please use the *National School Meals Program School Level Contact Person Reference Booklet* for forms and for detailed information on the following topics and for forms. For additional information on federal policies and procedures, visit [www.squaremeals.org](http://www.squaremeals.org).

## **Application Form**

All applications should be completed online at [www.iltexas.org](http://www.iltexas.org) and will be processed in a timely fashion. Parents will receive their statuses via email within 10 business days of processing. Approved applications will **NOT** be returned to schools.

*Applications made within International Leadership of Texas include all campuses within the district. If a family has children in more than one campus, each student may be included on a single application.*

## **Direct Certified Status**

The Direct Certified (DC) *status transfers* from one school district to another school district. Please call the Child Nutrition Department for further instructions. Students who have transferred from International Leadership of Texas to another district and then return to the district are considered DC.

## **Direct Certification**

Each year, all school districts receive a list of children from the state that are on the *Supplemental Nutrition Assistance Program (SNAP is formerly known as the Food Stamp Program)* and/or Temporary Aid to Needy Families (TANF) program. They *are* Direct Certification students, and are eligible for free meal benefits. If a student is on the DC list and other members of the household are not, the names of the other members of the household can now be added to the DC list. Benefits are extended within the first 30 operating days of the new school year.

## **Period of Enrollment**

Students who apply and are determined eligible for free or reduced lunches will remain eligible during the remainder of the school year. Students who withdraw from the district and elect to re-enroll during the same school year do not need to re-apply as their original application will remain in effect. Students must reapply every year, as previous year's statuses expire 30 days after the first day of school.

# **GIFTED AND TALENTED**

# GIFTED AND TALENTED

## Program Contact and Accountability

Dr. Laura Carrasco, Chief Academic Officer, [lcarrasconavarrete@ILTexas.org](mailto:lcarrasconavarrete@ILTexas.org)

Ashley Neuschwander, Advanced Academics Coordinator, [aneuschwander@iltexas.org](mailto:aneuschwander@iltexas.org)

**Student assessment for advanced academic opportunities** is collaborative and ongoing throughout the school year and cumulative through schooling experience (across the grade levels). Via the RtI process, as tracked through the Student Success Team (SST), led by GT Lead, all data will be collected and stored in a Portfolio (digital and physical). Students with a large learning capacity will be identified as GT learners, for purposes of the state, by a committee of GT trained educators from the campus and district. The portfolio will consist of:

### Advanced Academics (Gifted and Talented) Potential Portfolio/SST Documentation

#### *Gifted Characteristics*

- o Teacher and parent survey/Referral Form
- o GT IEPs once determination is made
- o SST documentation

#### *Assessment Data*

- o Ability test (CogAT scores)

#### *Student Pieces (these pieces can be uploaded to Seesaw for digital “work” portfolios)*

- o Projects and performances
  - Pre-determined, grade level wide projects
  - Student selected pieces
  - Teacher selected pieces
  - Data (Reading Levels, Unit assessment data, MAP results, etc) that is open to be shared with parents

Transfer students seeking to be identified for needing GT services will need to submit identification data from previous school to campus GT committee for review. Additional information may be required.

ILTexas may or may not accept previous GT identification, as documented through PEIMS from their previous district.

Furlough of services, reassessment of needs, and the exiting students from receiving GT services will be reviewed by the SST committee on a case-by-case basis, as and if needed.

**Service Design/Curriculum & Instruction** is based on the academic needs of those students with the largest capacities to learn in the four core content areas. Additionally International Leadership of Texas serves the needs of students with leadership, athletic, linguistic (through trilingual enrichment model), and artistic capacities to excel above grade level peers. These identified students will have opportunities to work together as well as individually. These identified students will have opportunities to work together as well as individually. These opportunities for exploring a curriculum with advanced depth and complexity of content will be provided during school hours (i.e., enrichment time offerings, differentiated instruction, telescoping, curriculum modifications and accommodation, acceleration) and out of school as well (i.e., competitions, clubs, extracurricular activities, etc). As part of our campus master schedule, each grade level will

have a designated enrichment period whereby GT identified students (as well as others) will have an opportunity to be challenged on their level. Furthermore, part of the IL Texas GT service design is offering opportunities for acceleration as students qualify based on credit by exam qualification.

Moreover, additional opportunities are offered in Middle School and High School as follows:

- Pre AP and AP classes provide options, challenges, and appropriate depth and complexity of content.
- Juniors and Seniors in high school have access to Dual Credit classes on the university level.
- Leadership and Career assessment and training are provided in areas of strength (in collaboration with Kuder Galaxy, K-5, and Kuder Navigator 6-12).

This process will be reviewed annually on a campus and district level to determine how providing services to meet the needs of the most capable learners can be improved.

## Acceleration

### *Content Acceleration*

Acceleration may be used as appropriate for students in grades K-12. Decisions to accelerate should be made by the SST committee, consisting of 3 trained administrators and/or teachers. Parents, the student, and others may also be included when applicable.

- Curriculum compacting
  - o Pre-assess at beginning of new academic area (MAP).
  - o Curriculum is “compacted”, taught at a faster pace with time to incorporate advanced content and skills via differentiated instruction (of TEKS RS Units) and or via enrichment period/time.
- Single-subject acceleration into advanced classroom
  - o Appropriate for a student who is advanced in a specific domain such as math.
  - o Use results from TTU Credit By Exam or MAP data (80-90% proficiency required).
  - o The student leaves the regular classroom to attend accelerated class in appropriate grade level (i.e., 1<sup>st</sup> grader receiving RLA instruction with 2<sup>nd</sup> grade teacher, 5<sup>th</sup> grade student taking 6<sup>th</sup> grade math, 7<sup>th</sup> grader taking Algebra I, 8<sup>th</sup> graders taking English I, Dual Credit and AP courses at the high school level, etc).

### *Grade Level Acceleration K-5*

All students are eligible to be considered for grade level acceleration, if they **meet all of the following criteria**:

- score of 80% or higher on a district or state developed exam (CBE by Texas Tech) in **all** core areas: reading language arts, mathematics, science, and social studies *in English and Spanish for students participating in fully implemented 45%/45% DLI program while taking into account 10% Chinese language development.*
- recommendation from SST (with teacher input)
- student’s parent/guardian’s written approval

The SST (with teacher input) will determine timeframe of when qualifying students will be accelerated into advanced grade level.

### *Course Acceleration 6-12*

Students are eligible to test for credit by exam through IL Texas. Course credit will be awarded for the following:



- score of 80% or higher on exam (CBE by Texas Tech) -or-
- score of 3 or higher on AP exam -or-
- score of 75 or higher on CLEP exam

The course will appear on the transcript as a P (Pass). Regardless of the exam, the grade will not be calculated into GPA.

***Exam Windows***

The CBE exams will be administered 4 times annually upon referral by SST.

Testing Windows:

- July 1-September 30
- October 1-December 31
- January 1-March 31
- April 1-June 30

Students may attempt exam up to two times per subject.

Parents are responsible for the CBE exam fees unless the referral is made by the SST committee based upon a recommendation by the student’s teacher who observes that the student’s academic needs are not being met in the current grade level.

**Link to purchase CBE testing:** <http://www.depts.ttu.edu/k12/programs/testing/institutional/>

**Professional Development** on the nature and needs of gifted students will be provided to all administrators, counselors, and specific instructors. Specific Instructors are required to complete the 30-hour GT Foundations training through any regional ESC (via both online and face-to-face platforms) and complete an additional 6-hour update annually. Foundations 1 & 2 (face-to-face) will include an orientation of the district's identification process and service model. The GT Coordinator Ashley Neuschwander will be involved with the planning and conducting of the face-to-face training.

\* Teachers who have attended the College Board five-day summer institute will be omitted from days 3 and 4.

As teachers receive their 30-hour GT training and/or 6-hour update certificates, they will need to submit their certificates of completion to the campus AP over GT, as well as upload the documents to Eduphoria. For any teacher, the above training is not a substitute for teachers having to take the state GT exam and adding the GT supplemental to their teaching certificate through TEA/SBEC, if desired (not required by ILTexas).

**Family and Community Involvement** will be encouraged. Information on GT services will be available on the website and will be shared at informational meetings. Family and community members will also have an opportunity to join TAGT parent association. Parents will be informed of the array of learning opportunities, and products and achievements will be shared with the community. Parents are included in the annual evaluation of GT services process.

**Campus GT Leads**

GT Leads will meet at least once per semester with district Advanced Academics/GT Coordinator (Ashley Neuschwander; [aneuschwander@iltexas.org](mailto:aneuschwander@iltexas.org)). GT Leads will be charged with leading their campuses towards full implementation of the above components of our GT program. GT Leads will serve as Subject Matter Experts and will need to assist either in person or other communication with GT-SSTs or Pre-GT-SSTs to help guide the committee in making the most instructionally sound decisions/ interventions for our GT kids and GT-IEPs as needed.

Each campus will designate two IAs and the Media Specialist that will be trained as CogAT testing Proctors.

### **PEIMS Reporting**

Principals shall ensure that reports from the Texas Education Agency (TEA), which reflect actual Public Education Information Management System (PEIMS) data, are compared to campus reports for accuracy.

The Gifted and Talented campus lead should provide appropriate data entry personnel or Advanced Academics Coordinator Ashley Neuschwander with the names and coding information of students who are eligible, whose documentation is in order, and who are being served. **In no case should clerical personnel be responsible for determining a student’s gifted and talented indicator code.** Gifted and Talented Leads are responsible for ensuring that clerical personnel or Ashley Neuschwander are aware of changes in a student’s services and effective dates of such changes. The designated personnel are then responsible for entering changes at the end of each six-week reporting period, the Gifted and Talented Lead shall notify the campus principal of any Gifted and Talented Report coding errors, with the principal having final signature verification.

### **Authority: State Law**

State law can be found in the Texas Education Code (TEC) Chapter 29: Educational Programs; Texas Administrative Code (TAC) Chapter 89: Adaptations for Special Populations, Subchapter A; Gifted/Talented Education; International Leadership of Texas Charter School (International Leadership of Texas CHARTER SCHOOL) Board Policy

### **GT Coding Within Student Information System (Skyward)**

The gifted and talented indicator code must reflect the student’s identification for gifted and talented services for each six-week/nine-week reporting period.

- All students identified as Gifted and Talented and receiving Gifted and Talented services should be GT PEIMS coded including the student’s GT program entry effective date.
- The gifted and talented indicator code is removed from the attendance accounting system by the clerical personnel, only when directed by the GT Campus Lead. The effective date of dismissal should be recorded.

### **Documentation**

In order to claim gifted and talented enrollment for funding, documentation must be complete, which includes the following:

- Student identification and assessment is complete according to International Leadership of Texas CHARTER SCHOOL policy;
- Student’s G/T Program Services are complete according to International Leadership of Texas CHARTER SCHOOL policy:
  - Includes documentation of teacher’s G/T training complete according to

- International Leadership of Texas CHARTER SCHOOL policy;
- Includes documentation of student scheduled in mandated courses according to International Leadership of Texas CHARTER SCHOOL policy;
- Includes implementation of G/T Curriculum Framework, Scholars and Knowledge according to International Leadership of Texas CHARTER SCHOOL policy.

Controls are in place to ensure that a student is included in only one campus gifted and talented count. If the student changes campuses during a six-week/nine-week reporting period or attends another campus to receive gifted and talented instruction, the student’s participation in the program will only be counted once.

At the **beginning** of each school year, the principal’s appointed Campus Gifted and Talented Lead shall review the clerical personnel input of initial coding within the Student Management System for accuracy. The principal of each campus has final compliance responsibility and must sign and verify the accuracy of campus coding for G/T students.

At the end of each six-week/nine-week reporting period, the Campus Gifted and Talented Coordinator shall review the clerical personnel input within the Student Management System for accuracy. The principal of each campus has final compliance responsibility and must sign and verify the accuracy of campus coding.

**Gifted and Talented Definition**

Students who participate in services designed for Gifted and Talented Students will demonstrate skills in self-directed learning, thinking, research, and communication as evidenced by the **development of innovative products and performances** that are advanced in relation to students of similar age, experience, or environment and reflect individuality and creativity.

**State Definition of the Gifted and Talented Student**

TEC §29.121. DEFINITION: A Gifted and Talented Student means a child or youth who performs at, or shows the potential for performing at, a remarkably high level of accomplishment when compared to others of the same age, experience, or environment and who:

1. Exhibits high performance capability in an intellectual, creative, or artistic area;
2. Possesses an unusual capacity for leadership;or
3. Excels in a specific academic field.

*Added by Acts 1995, 74th Leg., ch. 260, § 1, eff. May 30, 1995.*

**Local Definition of Gifted and Talented**

International Leadership of Texas ISD defines Gifted and Talented as any child or youth in grades K-12 who performs at, or shows the potential for performing at, a remarkably high level of accomplishment when compared to others of the same age, experience, or environment, and who:

- 1) Exhibits high performance capability in general intellectual ability; or
- 2) Excels in one or more specific academic fields: math, science, language arts, and/or social studies

## **Goal of Gifted and Talented Services**

Students who participate in services designed for Gifted and Talented Students will demonstrate skills in self-directed learning, thinking, research, and communication as evidenced by the **development of innovative products and performances** that are advanced in relation to students of similar age, experience, or environment and that reflect individuality and creativity.

## **Goals for K-12 Gifted and Talented Services**

### **1. IDENTIFICATION**

Identify students in grades K-12 who demonstrated an academic need for Gifted and Talented services using the criteria established by the district, approved by the board, and in compliance with the state mandates.

### **2. SELF-DIRECTED LEARNERS**

Develop the students' capacities to become self-directed and to be confident in their ability to research and process information and to create and communicate their findings as they produce and present advanced-level products or performances as well as products and performances of professional quality at the high school exit level.

### **3. COMPLEX THINKING SKILLS**

Enhance and refine the abstract and complex thinking and reasoning of these students through more sophisticated creative and critical thinking activities as they reflect and refine their own thinking processes.

### **4. APPROPRIATE INSTRUCTIONAL STRATEGIES**

Provide students with multiple opportunities to participate in learning experiences using advanced content (within the four core areas) which are defensibly differentiated in depth, complexity and range through modification to content and/or process and/or product. Students will be able to work independently, with groups of other gifted students, and with groups of non-gifted peers.

# **IMMIGRANT AND MIGRANT EDUCATION**

# **IMMIGRANT AND MIGRANT EDUCATION PROGRAM**

## **Program Contact and Accountability**

Veronica Csorvasi, Director of EL K-12, [VCsorvasi@ILTexas.org](mailto:VCsorvasi@ILTexas.org)

Krystal Lovato, Executive Director of Federal Programs, [klovato@iltexas.org](mailto:klovato@iltexas.org)

## **Responsibility**

The principal designates appropriate campus personnel responsible for identifying students who are eligible for the Migrant Education Program, ensuring that supporting documentation is in order for students. The corresponding data entry position is responsible for determining that the appropriate information is entered into the Student Management System.

It is the responsibility of each Campus Data Clerk to report the entry and withdrawal of all students to the District Migrant point person to insure that migrant students are appropriately coded and reported.

The Campus Immigrant Administrator should work collaboratively with the PEIMS Data Clerk contact (if different) in providing attendance personnel with names and demographic information of students who are eligible, whose documentation is in order, and who are being served. The Campus Immigrant Administrator is also responsible for ensuring that attendance personnel are aware of changes in student services and effective dates of such changes. The attendance personnel are then responsible for entering changes in the detailed student attendance accounting system (manual or automated). At the end of each six-week reporting period, the Campus Immigrant Administrator should verify the Student Detail Report for any demographic errors.

Principals shall ensure that reports from the Texas Education Agency (TEA), which reflect actual Public Education Information Management System (PEIMS) data, are compared to campus reports and student folder documentation for reasonableness and accuracy.

## **Definition**

The Federal Title I, Part C Migrant Education Program (MEP) was created in 1966 as part of a national effort to address the special educational needs of farm worker children who move with their families to harvest the fruits and vegetables that help feed our nation. The Migrant Education Program ensures that all migratory children who move among the states are not penalized in any manner by disparities among states in curriculum, graduation requirements or state academic content and student academic achievement standards. The Texas MEP's goal is to provide all migrant children with the opportunity to reach challenging academic standards and graduate with a high school diploma (or complete a GED) in order to prepare them for responsible citizenship, further learning and productive employment.

The term migratory child means a child, ages 3-21, who is, or whose parent or spouse is, a migratory agricultural

worker, including a migratory dairy worker, or a migratory fisher, and who in the preceding 36 months, in order to seek or obtain, or accompany such parent or spouse who seeks or obtains, temporary or seasonal employment in agriculture or fishing work and who:

- has moved from one school LEA to another
- in a state that is comprised of a single LEA, has moved from one administrative area to another within such district,
- resides in a school district of more than 15,000 square miles, and migrates a distance of 20 miles or more to a temporary residence to engage in a fishing activity.

### **Data Components**

Data components for the SIS Migrant Panel are as follows:

- Migrant Status
- NGS Number
- Qualifying Arrival Date
- End of Eligibility

Migrant student data is entered and maintained by the data specialist of the Migrant Education Program. Using SIS, schools may periodically query the roster of eligible migrant students.

### **Documentation Required to Support Data**

A valid Certificate of Eligibility (COE) must be on file with the Migrant Education Program (MEP) for a student to be coded on SIS as a migrant student and to be considered eligible for service.

### **Enrollment Procedure**

The student enrolls in the district, and the parent completes a Home Language Survey. If a country other than the United States of America (USA) and any of its territories is indicated as the place of birth on the survey, and he/she has attended a USA school for three years or less, then that student can be identified as an immigrant student. The student's date of entry into USA schools must be filled out by the parents on the Home Language Survey. Students in grades 9-12 may complete the Home Language Survey. The Home Language Survey is completed only upon initial entry, and only if there is no evidence of prior completion of a Home Language Survey from a previous district in Texas.

**Data Component:** Enter Country of Origin data on the Personal panel, and Date First Entered US School data entry field on the Immigrant Panel/ Student and Immigrant Info.

**Required Documentation:** Home Language Survey in LEP/ELL folder and Enrollment Card

## **Eligibility for Immigrant Funding**

A student must meet the following requirements in order to be eligible for state immigrant (Title III) funding. Student date of initial entry into USA schools and grade level is reviewed by the Immigrant Data Entry Contact upon the student's enrollment to determine eligibility.

Students entering grades **PK, K or 1**, and who are born outside of the USA, must automatically be given immigrant status if they meet the criteria above, unless a first grade student has been retained.

**Data Component:** Report Card information, Student and Immigrant Information Panel, LEP/EL folder

**Required Documentation:** Documents provided by parents at initial enrollment

## **Definition of an Immigrant Student**

An immigrant student is defined as one who:

- Is ages 3-21 years of age AND
- Was born outside of the United States or any of its territories AND
- Has not attended a USA school in the past three complete PEIMS years (years are cumulative and not necessarily consecutive)

Note: Grades PK, K, and 1 students born outside of the USA must automatically be given immigrant status, unless a Grade 1 student has been retained.

The criteria may include:

- Only students who are not US citizens
- Lawful permanent resident aliens
- Refugees
- Parolees
- Persons of other immigrant status
- Undocumented residents

The criteria should exclude:

- US citizens' children who were born abroad
- A student who is a citizen of the USA or born in the USA

Immigrant students who meet eligibility will be coded with a "Yes" indicator in the IMMIGRANT Status Indicator grid on the Immigrant PEIMS Coding panel, which is determined **automatically** by the original calculation based on Date Entered USA School. The only entry in this panel will be the date in the appropriate box. The system will calculate the years of eligibility once this process is completed.



Data Component: The Country of Origin, Date First Entered USA School and Complete Years in USA codes on Student and Immigrant Information Panel will automatically calculate years of eligibility shown as a grid report on the Immigrant PEIMS Coding Panel.

Required Documentation: Home Language Survey

The number of complete years the student has attended a school in the USA is calculated in relation to the PEIMS Snapshot Date. The allowable three years of eligibility are determined by counting the total number of school years in which the student was enrolled (for any amount of time). Years are calculated beginning with the student's initial year in a USA school and are cumulatively calculated, regardless of gaps in enrollment during any of those years.

### **Ineligibility for State PEIMS Funding**

An immigrant student becomes ineligible for immigrant funding after three PEIMS years of immigrant eligibility and will appear as a “No” in the Immigrant Status grid for not eligible.

### **Required Documentation**

In order to claim Immigrant "PEIMS Eligible" years for funding, documentation must be complete. All documentation supporting student eligibility must be in the student’s Limited English Proficient (LEP/EL) folder (and/or in the LPAC Documentation binder when applicable) for every student accumulating eligible immigrant years on the Immigrant PEIMS Coding Panel. The documentation requirements are: the Home Language Survey and the birth certificate or other identifying documents.

The Home Language Survey shall be administered in English and Spanish for students of other language groups, the Home Language Survey shall be translated into the home language whenever possible. The Home Language Survey shall contain the following information in accordance with the No Child Left Behind Act PL 107-110, 2001.

- Place of birth, city and country
- Date of initial entry into US schools
- Number of complete academic years in a US school

Written documentation of the information above must be noted on the Home Language Survey. This record must include the parent's signature and should contain a "date completed by parent" or "date received by district".

Data Component: The Country of Origin, Immigrant Indicator Code, Date First Entered USA School and Complete Years in US codes on the birth city and birth state from the Student Demographic Panel.

Required Documentation: Home Language Survey, birth certificate or other admissible document (INS card, passport).

### **Quality Control**

NOTE: TEA uses the Immigrant Indicator and complete years in USA School for Title III Immigrant funding.

A student should have an Immigrant Indicator code recorded in the Immigrant Status Indicator grid of the Immigrant PEIMS Coding Panel as soon as ALL eligibility requirements have been met. All documentation must be on file to back up the Immigrant Status Indicator code.

As soon as a student completes three academic years in a USA school, the student should no longer have an Immigrant Indicator code.

At the beginning of each year (before the PEIMS Snapshot date), the appropriate staff should verify the status of each immigrant student to ensure that coding is correct.

Students who are counted for funding as Immigrants must have all documentation on file.

### **TEA Funding or Compliance Audits**

- Deleting important data on Immigrant Info Panel or Immigrant PEIMS Coding Panel (i.e. country of origin and date entered US schools) in order to be error- free on PEIMS without checking to verify information first on the Home Language survey and/or birth records
- Missing LEP/EL folder available or empty folder LEP/EL or LEP/EL folder with outdated information
- Placing too many Home Language Surveys in the LEP/EL folder
- Failing to match documentation on LEP/EL folder or Home Language Survey with
- Immigrant Information Panel or Immigrant PEIMS Coding Panel
- Missing Country of Origin or coded as N/A on the Personal Panel
- Entering Country of Origin as US or any of its territories on the Personal Panel
- Missing date entered USA school on the Immigrant PEIMS Panel

# **LEAVERS AND GRADUATES**

## **LEAVERS**

### **Program Contact and Accountability**

Principal on campus will be the person of Program Contact and Accountability

### **School Requirements**

Schools must document the withdrawal of students in grades 07-12 and maintain on file the appropriate paperwork associated with student withdrawals. Documentation is required to support all leaver and mover reason codes. All documents are uploaded in Skyward.

Student withdrawals from ILTexas are coded automatically into Skyward as a “98” until required documentation is obtained to change to the appropriate leaver code.

Leavers are students who leave Texas public education. Leavers include:

- ✓ Graduates,
- ✓ Students who died,
- ✓ All dropouts,
- ✓ Students who fail to re-enroll in the fall (no-shows),
- ✓ Students who enroll in private school,
- ✓ Students who enroll in an out-of-state school,
- ✓ Students who leave for homeschooling,
- ✓ Students who return to their home country
- ✓ Students withdrawn by the school district
- ✓ Students who are expelled
- ✓ Other school leavers identified during the previous school year.
- ✓ Student leavers in special education and other special, ungraded, or state-approved alternative programs are included.

Movers are students who move to another Texas public school, including state charter schools and other International Leadership of Texas CHARTER SCHOOL schools. Movers include:

- ✓ Students enrolled in another Texas public school district
- ✓ Students who earn a GED certificate at a Texas examination site by August 31, or

- ✓ Students who are accounted for by other state reconciliation processes.

Schools must enter appropriate leaver reason codes into the Student Management System that most accurately describes the student’s whereabouts during the school-start window. The school-start window extends from the first instructional day of school through the last Friday in September. Detailed leaver code information is available in TEA’s Appendix D, Summary of Leaver Reason and Required Documentation, but is summarized below.

## Documentation Requirements by LEAVER-REASON-CODE

In addition to general documentation requirements, requirements specific to leaver reason codes also apply. Following are the specific documentation requirements by leaver reason code. They are grouped into four major categories: graduated or received an out-of-state GED, moved to other educational setting, withdrawn by school district, and other reasons. School leavers with this LEAVER-REASON-CODE are counted as dropouts for state accountability purposes: code 98. School leavers with this LEAVER-REASON-CODE are counted as dropouts for federal accountability purposes: codes 88, 89, 98. These designations are provided for information purposes only. They are not the final or comprehensive description of the definitions used for dropout and completion processing. For more information please see the *Secondary School Completion and Dropouts in Texas Public Schools*.

<b>GRADUATED OR RECEIVED AN OUT-OF-STATE GED</b>	
<b>01</b>	<p><b>Student graduated from a campus in this district or charter</b>  <b>Definition and use:</b> Use for students who meet all high school graduation requirements (which includes passing the state assessments required for graduation) at any time during the prior school year, including the summer (through August 31) following the close of the prior year. To graduate, a student must satisfy the requirements under 19 TAC Chapter 74, Subchapter B. Special education students must satisfy requirements under 19 TAC §89.1070. Students who complete all course requirements for graduation in one school year but do not pass the state assessments required for graduation until a later year, are reported as graduates in the school year in which the state assessments are passed, and the diploma is issued.  <b>Documentation requirement:</b> Transcript showing sufficient credits, successful completion of the state assessments (including testing dates) required for graduation, graduation seal, school official signature, and date of completion.</p>
<b>85</b>	<p><b>Student graduated outside Texas before entering a Texas public school, entered a Texas public school, and left again</b>  <b>Definition and use:</b> This code may be used for students who graduated in another state or country before entering Texas public schools. This code may also be used for students who graduated from Texhoma High</p>

	<p>School, Texhoma, Oklahoma.  <u><b>Documentation requirement:</b></u> Transcript showing sufficient credits, date, and school official signature, and a diploma with a graduation seal.</p>	
86	<p><b>Student completed the GED outside Texas</b>  <u><b>Definition and use:</b></u> This code may be used for students who earned GED certificates outside Texas, including students living in Texas and earning GED certificates online from a testing company in another state, before enrolling or after leaving Texas public schools.  <u><b>Documentation requirement:</b></u> Acceptable documentation is a copy of the GED certificate or some other written document provided by the testing company showing completion of the GED. Written documentation from the testing company must include the date of GED completion, location, address, and contact information of the company.</p>	
90	<p><b>Student graduated from another state under the provisions of the Interstate Compact on Educational Opportunity for Military Children</b>  <u><b>Definition and use:</b></u> Per TEC §162.002, student lives in the household of an active-duty military serviceperson, transferred into Texas public schools at the beginning of or during his or her senior year, did not meet the requirements to graduate from Texas public schools, did meet requirements to graduate from a school in the sending state, and, under the provisions of the Interstate Compact on Educational Opportunity for Military Children, graduated from a school or district in the sending state.  <u><b>Documentation requirement:</b></u> Transcript showing sufficient credits, date, and school official signature, or a diploma with a graduation seal</p>	
<b>MOVED TO OTHER EDUCATIONAL SETTINGS</b>		
24	<p><b>Student entered college and is working towards an Associate's or Bachelor's degree</b>  <u><b>Definition and use:</b></u> This code is for students who leave secondary school to enter college early. It should be used for students who are enrolled full-time (at least 9 credit hours per semester). This code is also for students who leave school to enter a dual-credit program established by the Texas Legislature at the Texas Academy of Mathematics and Science at the University of North Texas, the Texas Academy of Leadership in the Humanities at Lamar University, the Texas Academy of Mathematics and Science at the University of Texas at Brownsville, and the Texas Academy of International Studies at Texas A&amp;M International University.  <u><b>Documentation requirement:</b></u> Documentation of enrollment in a college or university must indicate that the student is enrolled full-time in an academic program. Per federal requirement, it is not permissible for a district to document that, at the time of withdrawal, the student intended to enter a post-secondary educational setting. Beginning with students leaving in the 2011-12 school year, a district must document that the student has actually entered a post-secondary educational setting. One of the following types of documentation is required to verify enrollment: Transcript Request. Acceptable documentation of enrollment in college is a records request from the college in which the student is enrolled. Telephone requests must be documented in writing, including the date of the call, the name of the college requesting the records, the name of the person making the request, and the name of the person who received the call. Telephone requests should appear on a standardized, district approved form. The original of the form should be included in the student's permanent file. Documentation of the method of records dissemination also must be included in the student's permanent file (e.g., copy of fax activity log, certified mail receipt, encrypted email receipt confirmation, or postage/mail log with complete address information for requesting school). Verification by an authorized representative of the college. Assigned letter from the college verifying enrollment is also acceptable documentation. The letter must state the name and location of the college in which the student is enrolled and the date of enrollment. Other acceptable documentation is written documentation of an oral statement by a representative of the college providing the</p>	

	<p>name and location of the college and verifying that the student is enrolled, signed and dated by an authorized representative of the district. Verification by the parent/guardian or qualified student. Acceptable documentation includes a letter, signed and dated from the parent, guardian, or qualified student stating that the student has enrolled in college in a program leading to an associate's or bachelor's degree</p>	
<p><b>60</b></p>	<p><b>Student is homeschooled</b>  <u><b>Definition and use:</b></u> Student is being homeschooled. This code may be used only for a student whose parent/guardian confirms that the student is pursuing, under the direct supervision of the parent/guardian, a curriculum designed to meet basic education goals. The district is not required to obtain evidence that the program being provided meets educational standards.  <u><b>Documentation requirement:</b></u> District must document that the parent/guardian is homeschooling the student. Per federal requirement, it is not permissible for a district to document that, at the time of withdrawal, the student intended to be home-schooled. Beginning with students leaving in the 2011-12 school year, the following documentation is required to verify enrollment: Verification by the parent/guardian. A letter, signed and dated, from the parent/guardian stating that the student is being home schooled is acceptable documentation. Letters from parents/guardians must indicate the actual date homeschooling began.</p>	
<p><b>66</b></p>	<p><b>Student was removed by Child Protective Services (CPS) and the district has not been informed of the student's current status or enrollment</b>  <u><b>Definition and use:</b></u> This code applies only to Child Protective Services. Private agencies that provide asylum for students do not have the legal authority to remove students from school.  <u><b>Documentation requirement:</b></u> Acceptable documentation includes due process documentation supporting the withdrawal; a written statement, signed and dated by the CPS officer, including the CPS officer's name and contact information; or written documentation of an oral statement by a CPS representative that the child was removed, including the CPS representative's name, the date of the conversation, and the signature of the school official.</p>	
<p><b>81</b> <b>82</b></p>	<p><b>Student enrolled in a private school in Texas</b>  <b>Student enrolled in a public or private school outside of Texas</b>  <u><b>Definition and use:</b></u> Student is enrolled in a private school in Texas (code 81), the Texas Job Corps Diploma Program (code 81), or a public or private school outside Texas (code 82). Documentation of actual enrollment is required. This code is also used when a student moves from the district without withdrawing but the district receives a records request. If the student enrolls in another school in the district or another public school district in Texas, a leaver record is not submitted. If the district did not assign code 81 or code 82 when the student stopped attending, the district can change the original code assigned to the student when the records request or communication from the parent/guardian or qualified student is received. If the original withdrawal date for the student is later than the date the student enrolled in the other school, the withdrawal date must be changed and all attendance accounting records affected by this change must be updated.  <u><b>Documentation requirement:</b></u> Per federal requirement, it is not permissible for a district to document that, at the time of withdrawal, the student intended to enter another educational setting. Beginning with students leaving in the 2011-12 school year, a district must document that the student has actually enrolled in a private school in Texas, the Texas Job Corps Diploma Program, or a private or public school outside Texas. One of the following types of documentation is required to verify enrollment: Transcript Request. Acceptable documentation of enrollment in another school is a records request from the school in which the student is enrolled. Telephone requests are acceptable, but they must be documented in writing, including the date of the call, the name of the school requesting the records, the name of the person making the request, and the name of the person who received the call. Telephone requests should appear on a standardized, district-approved form. The original of the form should be included in the student's permanent file. Documentation of the method of records</p>	

	<p>dissemination also must be included in the student’s permanent file (e.g., copy of fax activity log, certified mail receipt, encrypted email receipt confirmation, or postage/mail log with complete address information for requesting school). Verification by the superintendent or authorized campus or district administrator of the receiving district. A signed letter from the receiving school verifying enrollment is acceptable documentation. The letter must state the name and location of the school in which the student is enrolled and the date of enrollment. Other acceptable documentation is written documentation of an oral statement by a representative of the receiving school providing the name and location of and contact information for the school and verifying that the student is enrolled, signed and dated by an authorized campus or district administrator of the district. Verification by the parent/guardian or qualified student. Acceptable documentation includes a letter, signed and dated, from the parent/guardian or qualified student stating that the student has enrolled in a private school in Texas or a private or public school outside of Texas leading to the completion of a high school diploma</p>	
<p><b>87</b></p>	<p><b>Student withdrew from/left school to enroll in the Texas Tech University ISD High School Diploma Program or the University of Texas at Austin High School Diploma Program</b>  <b>Definition and use:</b> Student was withdrawn from school and parent/guardian or qualified student indicated at the time of withdrawal that the student has enrolled in the State Board of Education-authorized Texas Tech University ISD High School Diploma Program or the University of Texas at Austin High School Diploma Program.  <b>Documentation requirement:</b> The district must receive either a) a records or transcript request from the high school diploma program or b) a letter from the high school diploma program stating that the student is enrolled.</p>	
	<p><b>WITHDRAWN BY SCHOOL DISTRICT</b></p>	
<p><b>78</b></p>	<p><b>Student was expelled under the provisions of TEC §37.007 and cannot return to school</b>  <b>Definition and use:</b> This code may only be used when: • the student was expelled under the provisions of TEC §37.007, and • the term of expulsion has not expired or the student’s failure to attend school is due to court action. This code may only be used for a student who was expelled for an offense included in TEC §37.007. This code is not intended for use by districts which assign students to a Juvenile Justice Alternative Education Program (JJAEP).  <b>Documentation requirement:</b> Due process documentation supporting the expulsion.</p>	
<p><b>83</b></p>	<p><b>Student was attending and was withdrawn from school by the district when the district discovered that the student was not entitled to enrollment in the district because a) the student was not a resident of the district, b) was not entitled under other provisions of TEC §25.001 or as a transfer student, or c) was not entitled to public school enrollment under TEC §38.001 or a corresponding rule of the Texas Department of State Health Services because the student was not immunized.</b>  <b>Definition and use:</b> This code is for situations in which the district discovers when verifying enrollment information that the student is not entitled to enrollment in the district because the student is not a resident of the district or is not entitled under other provisions of TEC §25.001 or as a transfer student. It is not for a student who was a resident of the district and who stops attending because he/she has moved. This code is also for rare situations in which the student has not met the requirements under TEC §38.001 or a corresponding rule of the Texas Department of State Health Services for immunization, provisional enrollment, or exemption. Subject to the exceptions in TEC §38.001(c), a student is required to be fully immunized against disease as required by the Texas Department of State Health Services (TEC §38.001(a)). A student may be provisionally admitted if the student has begun the required immunizations and continues to receive the necessary immunizations as rapidly as medically feasible (TEC §38.001(e)). Except as provided by TEC §38.001(c) or by rule of the Department of State Health Services, a student who is not fully immunized and has not begun the required immunizations may not attend school. For further information about enrollment procedures, please see the Student Attendance</p>	



	<p>Accounting Handbook. For further information about immunization requirements, immunization exemptions, and immunization documentation, please contact the Texas Department of State Health Services.</p> <p><b>Documentation requirement:</b> Due process documentation supporting the withdrawal. All district actions to withdraw a student must be documented or the documentation for use of this leaver reason code may be considered insufficient. For purposes of leaver reason code 83, due process is defined as completion of the following steps: 1. District provides oral or written notice, appropriately documented, to the student's parent, guardian, or qualified student him- or herself of intent to withdraw the student, reasons for the withdrawal, effective date of withdrawal, and date of hearing or conference at which the parent, guardian, or qualified student will have an opportunity to respond to allegations that the student is not entitled to be enrolled in the district. Steps 2 and 3 are not required for cases in which the parent, guardian or qualified student agrees that the student is not entitled to enrollment in the district. Step 4 is always required for charter districts. 2. District provides a hearing or conference at which the district presents the reasons for withdrawal, and the parent, guardian, or qualified student is given the opportunity to respond to the reasons for withdrawal. 3. District provides a written report to the parent, guardian, or qualified student that contains the findings of fact and district decision following the hearing or conference. The written report shall include notice of the parents, guardians, or qualified student's right to appeal the district's decision. 4. Charter districts shall notify the school district in which the student resides within three business days of withdrawing a student from a charter school, per Texas Administrative Code §100.1211.</p>	
	<p><b>OTHER REASONS</b></p>	
<p><b>03</b></p>	<p><b>Student died while enrolled in school or during the summer break after completing the prior school year</b>  <b>Definition and use:</b> Self-explanatory.  <b>Documentation requirement:</b> Acceptable documentation includes a copy of the death certificate or obituary, a program from the funeral or memorial service, a written statement from the parent or guardian, and written documentation of an oral statement by a parent or guardian stating that the student has died.</p>	
<p><b>16</b></p>	<p><b>Student returned to family's home country</b>  <b>Definition and use:</b> Use for students who are leaving the United States to return to their home country. A student may be leaving with or without family members to live with his or her family, immediate or extended, in the home country. The citizenship of the student is not relevant in assigning this code. This code can also be used for foreign exchange students.  <b>Documentation requirement:</b> Acceptable documentation is a copy of the Transfer Document for Binational Migrant Student completed at the time the student withdraws from school, signed and dated by an authorized campus or district administrator. Acceptable documentation is also a copy of the withdrawal form signed and dated by the parent/guardian or qualified student and a campus or district administrator. The withdrawal form should indicate that the student is leaving school because the student is returning to the home country and should specify the destination. An original signature is not required on withdrawal forms received in the district by fax. Withdrawal forms received by e-mail do not need to be signed by the parent/guardian or qualified student. A signed letter from the parent/guardian or qualified student stating that the student is leaving school because the student is returning to the home country is also acceptable documentation. Acceptable documentation for foreign exchange students includes a written, signed, and dated statement from the student's host family or the foreign student advisor verifying the student's return to his or her home country. Other acceptable documentation is written documentation of an oral statement by an adult neighbor or other adult with knowledge of the family's whereabouts, signed and dated by an authorized campus or district administrator</p>	
<p><b>88</b></p>	<p><b>Student was ordered by a court to attend a GED program and has not earned a GED certificate</b>  <b>Definition and use:</b> This code is for students who are court-ordered to attend a GED program and have not</p>	

	<p>earned a GED certificate at any time during the prior school year, including the summer (through August 31) following the close of the prior year.</p> <p><b>Documentation requirement:</b> Acceptable documentation is a copy of the court order stating that the student has been ordered to attend a high school equivalency or GED program. Documentation must include the name of the student, the date of the order, the name of the judge making the order, and the county in which the judge presides. The order should state that the court is ordering the student to attend a high school equivalency or GED program or to take a high school equivalency or GED exam.</p>
89	<p><b>Student is incarcerated in a state jail or federal penitentiary as an adult or as a person certified to stand trial as an adult</b></p> <p><b>Definition and use:</b> Student is incarcerated in a state jail or federal penitentiary as an adult or as a person certified to stand trial as an adult.</p> <p><b>Documentation requirement:</b> Acceptable documentation is one of the following: 1) Oral notification from a law enforcement agency, the office of the prosecuting attorney, or the jail or penitentiary, to an authorized representative of the district, that the student is incarcerated. The written statement of the oral notification shall be signed and dated by the authorized representative. 2) Written notification from a law enforcement agency, the office of the prosecuting attorney, or the jail or penitentiary, that the student is incarcerated.</p>
98	<p><b>Other(reason unknown or not listed above)</b></p> <p><b>Definition and use:</b> This code is used for students who are withdrawn by the school district after a period of time because they have quit attending school and their reason for leaving is not known. It is also used for students who withdrew from/left school for reasons not listed above</p>

\* PEIMS leaver codes. School leavers coded with this LEAVER-REASON-CODE are not included in the calculation of the dropout rate used for accountability purposes.

**Graduates**

Schools must enter appropriate leaver codes in their Student Management System for all students who have met all high school graduation requirements at any time during the prior school year, including the summer following the close of the prior year. To graduate, students must satisfy the requirements under 19 TAC, Section 74, Subchapter B. Special education students must satisfy requirements under 19 TAC, Section 89.1070. For GRADUATION-TYPE-CODE, report the code that represents the program with the most stringent requirements that was completed by the student. References to the various Texas State Graduation Requirements are found on the TEA website at <http://www.tea.state.tx.us/curriculum/ugr.html>.

CAMPUS- ID is the campus where the student was enrolled at the time of graduation.

Students who have previously completed all graduation requirements in one school year, but do not pass the exit-level STAAR until the next year, are reported as graduates in the year in which the STAAR test was passed.

Students reported with a LEAVER-REASON-CODE of 01 must also have valid entries for DATE-OF-

GRADUATION, and GRADUATION-TYPE-CODE.

Students who complete a GED program are not reported as graduates.

**Students who leave during the school year**

Students who leave during the school year should have documentation at the time of withdrawal and uploaded in Skyward. Documentation of intent to enroll in a college, a private school, an out-of-state school, another International Leadership of Texas CHARTER SCHOOL school, or a Texas public school must be obtained within 10 days of the last day the student attended school. Attempts should be made to obtain verification of enrollment at the new school.

**Students who fail to return in the fall**

For students who fail to return the following fall, the school should use the leaver reason code that most appropriately describes the student’s whereabouts during the school-start window (from the first instructional day of school through the last Friday in September).

**Leaver folders and documentation**

Schools are required to maintain leaver documentation and folders for all students in grades 7-12, who withdraw from the school. These folders are subject to audit and are to be available for administrative review. The contents of the folders must be sufficient to support the leaver code assigned to the student. Detailed documentation guidelines are available in TEA’s Appendix D, Summary of Leaver Reason and Required Documentation, but are summarized below.

The registrar should be able to produce a copy of the student’s transcript, showing sufficient credits, successful completion of STAAR (including testing dates), graduation seal, school official’s signature, and date of completion.

The campus PEIMS contact person for leavers and dropouts is responsible for maintaining a leaver folder for all students, other than graduates, who withdraw from the school. Merits of leaver documentation are assessed at the time the documentation is requested or received during a data inquiry investigation. Determination of the acceptability of documentation is made by the professional staff conducting the investigation. The professional staff member should sign and date the documentation to indicate the documentation acceptability.

Once a school meets the documentation standard that supports the leaver reason code used, the school is not required to obtain additional information on the student; however, if the school receives additional information that accurately substantiates the student’s current status, the documentation should be filed and the coding adjusted. Documentation can be obtained at any time until the PEIMS Submission 1 re-submission date in early January. Hence, the determination of a document’s acceptability, indicated by the professional staff member’s signature and date, should be dated prior to the PEIMS Submission 1 re-submission date.

Coding may not be changed after the final PEIMS Submission 1st re-submission date, nor may data be corrected through the appeals process. If the school makes a mistake in coding, the school owns it.

## **Dropouts**

TEA is required by the Texas Legislature to use the standards of the National Center for Educational Statistics, NCES. These standards require that a student enroll and attend school during the school start window (from the first instructional day through the last Friday in September) in order to avoid being counted as a leaver and possible dropout. The importance of the school start window is demonstrated by the following examples.

- ✓ If a student does not return during the school start window or is not reported with a leaver code indicating a continuance in school, he may be counted as a dropout. Exception: Migrant students reported through International Leadership of Texas CHARTER SCHOOL Migrant Department may return prior to resubmission in early January, if tracked through the federal tracking system.
- ✓ Even if a student returns after the school start window and graduates the same year, he will be counted as a dropout.
- ✓ If a prior year’s senior does not graduate during his/her senior year, he/she must enroll during the next year’s school start window, or be counted as a dropout.

## **Campus of Accountability**

Leavers are assigned to the campuses that they were attending when they left the Texas public school system. Students referred to a Disciplinary Alternative Education Program (DAEP) or a Juvenile Justice Alternative Education Program (JJAEP) are assigned to a “campus of accountability” based on the campus that referred the student to DAEP or JJAEP. If the student is promoted beyond the terminal grade level of the referring school while attending DAEP or JJAEP, for dropout purposes the student will be attributed to the zoned campus of his/her grade level.

It is important that a campus review the Campus of Accountability roster to determine if there are students listed on the roster who should not be attributed to the campus. If not corrected, the campus will become the campus of accountability for these students.

## **District Requirements**

TEA requires International Leadership of Texas CHARTER SCHOOL to submit leaver records, referred to as “203 records”, for students served by the district in grades 7-12 during the prior school year and those students in grades 7- 12 who do not enroll in the district during the school-start window of the current year (from the first day of school through the last Friday in September). A record is not required for grades 7-12 students who were enrolled during the prior year and are enrolled in the school-start

window of the current year. International Leadership of Texas CHARTER SCHOOL is not required to report leavers and movers who were in grades K - 6 during the prior school year.

The chart below indicates the coding required for various prior year and current year student enrollment statuses for

grades 7-12.

Enrolled at some point in prior school year	Enrolled in current year within the school-start window	Enrolled on the current year fall as- of date	Enrolled in current year	As-of Status Code	Required reporting
Yes	No	No	No	A	100, 101, 203,* (grades 7-12)
Yes / No	Yes	Yes	Yes	B	100, 101, 110
Yes / No	Yes	No	Yes	C	100, 101
Yes	No	Yes	Yes	D	100,101, 110, 203* (grades 7-12)
Yes	No	No	Yes	E	100, 101, 203* (grades 7-12)
No	No	Yes	Yes	F	100, 101, 110
No	No	No	Yes	G	100, 101

\*If the student is a mover, a 203 record is not submitted.

As-Of-Status-Code, when used for PEIMS Submission I, indicates a student’s school-start window status and fall as-of date enrollment status for the current year.

As-Of-Status-Codes A, D, and E indicates that the student was enrolled last year but not within the school- start window this year; therefore, a school leaver record is required if the student was in grades 7-12 during the prior year.

As-Of-Status-Codes B, D, and F will be used by TEA to determine the fall as-of date enrollment for each district.

As-Of-Status-Code C is used to notify TEA that a student has been in the district within the school-start window during the current year, but not on the fall as-of date, so a 203 record is not submitted. Students coded with a C may or may not have been enrolled in the district during the prior year. Districts are required to report students who were not prior year students and were not enrolled on the current year fall as-of date. Students coded with a C will not be counted as enrolled students when TEA publishes enrollment counts by district.

**TEA Funding or Compliance Audits**

The following are some of the problems that are seen during audits:

- Leaver code discrepancies caused by not following Appendix D guidelines

- No administrative signature and/or date of review on documentation
- No documentation to support out-of-state GED codes
- No verification of home school enrollment (parental statement)

Note: If homeschool documentation indicates a name of school or business as the homeschool source, the leaver code should be “81” (Texas private school). If the location of the school or business is outside the state of Texas, the leaver code should be “82” (out of state school).

- Enrollment in or out of Texas with no school or district specified
- No verification of students returning to home country
- No Dropout Recovery Form for students withdrawing with leaver code “98”
- Requests for transcripts/records must be maintained so that the proper PEIMS Leaver Code can be assigned to students who do not show up at the assigned school. These students may have enrolled at a different campus, another Texas district, or in another state
- A procedure must be established to verify the enrollment of students in area private/parochial/open enrollment charter schools since these schools typically do not request records if the student has a copy of the latest report card. A letter in the spring requesting parents to notify the school if students will be attending a non- public school in the fall might be a part of this procedure. Document phone calls to schools requesting verification of the enrollment of former students.
- Leaver records must be kept on campus and available for administrative review and audit purposes for at least five years.
- An appropriate graduate leaver code missing from Status Field in Leaver Code

## **PREGNANCY RELATED SERVICES (PRS)**

# PREGNANCY RELATED SERVICES

## Program Contact and Accountability

Mary Albritton, Director of Counseling ..... Ext. 1025

## Responsibility

Staff	Responsibility
Community Services PRS Nurse Consultant	Assigns and monitors Compensatory Education Home Instruction (CEHI) Teachers. Collaborates with the Principal and staff of Community Services School, Manager and staff of Health and Medical Services, physicians, and Federal and State Compliance staff regarding PRS services requirements as mandated by TEA and PIEMS coding as mandated by Federal and State Compliance. Provides program information to students, parents, and/or educators as requested. Trains and supports the School Nurse/campus-based PRS case manager and/or campus contact person with information and resources that will assist them to ensure pregnant students adjust and remain in school during pregnancy and postpartum periods. Monitors campus-entered PRS data monthly. Provides follow-up and support for students after delivery and during transition back to campus.
School Nurse	Serves as campus-based PRS case manager. Conducts and documents findings from health assessments on the pregnant student and maintains organized and secure PRS folders. Includes CEHI teacher logs, physician's confirmation of pregnancy, and the Data Entry Form in the PRS folders. Communicates with the campus staff, CEHI teachers, and home and medical communities to assist the pregnant student to adjust and remain in school during pregnancy and postpartum periods. Maintains a close relationship with PRS staff and obtains signature of principal on the completed documentation required for PRS by TEA. Responsible for completing and entering auditable data utilizing PRS spread sheets and CEHI logs, and coding PRS PEIMS.
PRS Child Care Coordinator/Social Worker	Provides assistance to students for identification and location of quality childcare services. Assists with timely completion of required documentation for federally funded childcare programs in order to prevent interruption of services which could impact school attendance.
Student Caseworkers	Intervenes upon request of school staff in order to address measures necessary to prevent drop out.
School Data Clerk	Maintains accurate records for PEIMS attendance reporting for PRS students including PRS and CEHI entry date, exit date, and assures that data is current and available for audit.
Life Skills Program for Student Parents Coordinator (As designated by School principals).	Collaborates with campus Nurse/PRS case manager in providing services to pregnant/parenting students. Maintains separate file for identified Life Skills program participants.
Federal and State Senior Compliance Analysts	Ensures adherence to federal and state guidelines in the PRS program, serves as liaison between federal and state agencies and the PRS staff, keeps PRS staff informed of any updates and/or changes within the guidelines, provides monitoring and conducts reviews of the PRS program, and provides staff with PEIMS and local reports.



Staff	Responsibility
School Principal	Ensures that a description of the PRS program is included in the campus improvement plan, school staff complies with the guidelines of the PRS program, provides support to PRS staff that provide home instruction, appoints campus personnel to serve as primary contact for the PRS program, and ensures that reports from the Texas Education Agency (TEA) reflect actual Public Education Information Management Systems (PEIMS) data, as compared to locally produced reports for reasonableness and accuracy.
Classroom Teachers	Refer pregnant students to school nurse <ul style="list-style-type: none"> <li>▪ For entry into program</li> <li>▪ For excessive absences</li> </ul> Maintains a close working relationship with the School Nurse and other school staff. Communicates with Grad Lab staff regarding pregnant students' participation in supplemental online tutoring and courses. Consults regularly with CEHI Teachers in person or by email. Provides information, assignments, or other requirements to CEHI Teachers in a timely manner for students receiving home instruction.
Compensatory Education Home Instruction (CEHI) Teachers	Provide Compensatory Education Home Instruction to assigned students, including online instruction using district resources for curriculum, software, and hardware, maintain logs of students served, report weekly attendance, collaborate with school staff and home to ensure coordination of services, provide attendance personnel with names and coding information of students who are being served in the PRS program, be responsible for ensuring that attendance personnel are aware of changes related to student's services and effective dates of such changes, and assist with maintaining documentation for audit. Provide the Community Services PRS Nurse Consultant with original exit log within five days after CEHI is completed
School Attendance Clerk	Responsible for entering changes in the detailed student attendance accounting system (manual or automated)
PRS Secretary	Maintains database and updates of all students served; provides Community Services PRS Nurse Consultant with weekly updates of students served per teacher; and updated appropriate forms. Notifies each CEHI Teacher when student assignments are made (pager, cell, phone, e-mail) Gathers data for annual reports and other documents to upon request.

## Data Component

**Pregnancy Related Services (PRS)** are Support Services including Compensatory Education Home Instruction (CEHI) the pregnant student receives to help her adjust academically, mentally and physically stay in school. These services are delivered to the student when:

- the student is pregnant and attending classes on a district/charter school campus;
- the pregnancy prenatal period prevents the student from attending classes on a district campus; and
- the pregnancy postpartum period prevents the student from attending classes on a district campus.

The district may choose to offer both Support Services components and the CEHI component or only the CEHI component in a PRS Program. However, a district may not code any student as PRS in the attendance accounting system unless CEHI is included as one of the services provided by the district's PRS program.

The district receives 2.41 PRS weighted funding while PRS components are being provided to the student during the prenatal and/or postpartum periods.

Documentation by responsible campus officials and medical or nurse practitioners and maintaining certified teacher logs are required to claim PRS eligible days present for funding. (Section 7)

**Compensatory Education Home Instruction (CEHI)** is the mandatory support service component districts offer in a PRS program. CEHI provides academic services to the student at home or hospital when a valid medical necessity for confinement during the pregnancy, prenatal, or postpartum periods that prevents the student from attending classes on a district campus. CEHI must consist of face-to-face contact with a certified teacher of the district providing academic services to the student. Substitutes can be utilized to provide CEHI; however, the individual selected as the substitute must be a certified teacher. The certified teacher maintains a log to document the actual amount of prenatal and postpartum PRS CEHI each student receives. When students are provided CEHI, the district will continue to receive the 2.41 PRS weighted funding (i.e., students should continue to be coded in the attendance accounting system as receiving PRS while being served at home). Students who do not come to school and who do not receive CEHI and/or SPED Homebound must be counted absent in accordance with the Charts provided in this chapter.

Districts may not code students as PRS in the attendance accounting system in order to receive 2.41 PRS weighted funding unless CEHI is included as one of the services provided by the district's PRS Program. (for exceptions, see 9-19.12, Example 12 and 9.19.13 Example 13)

**Support Services** are the optional components of a PRS program that may be provided to the student during the prenatal period of the pregnancy while the student is pregnant and attending school. In addition, Support Services may be provided during the prenatal or postpartum periods of pregnancy while the student is confined at home or hospital bedside for a valid medical necessity or recovering from delivery and being served with PRS CEHI. In all cases, Support Services are provided to support the student and should not interfere with the academic services while she is on the school campus or receiving CEHI at home or hospital bedside. Districts offering support services with CEHI may code students as PRS in the attendance accounting system in order to receive the

2.41 PRS weighted funding beginning on the date support services are provided to pregnant students. Examples of Support Services that a district may choose to offer are:

1. Counseling services including the initial session when the student discloses the pregnancy;
2. Health services including services from the school nurse and certified athletic trainer;
3. Transportation for the student and/or the student's children to school, child care facility, community services, health services, etc;
4. Instruction (inside or outside the classroom) related to parenting knowledge and skills, including child development, home and family living, and appropriate job readiness training;
5. Child care for the student's child(ren);
6. Schedule modifications (See 9.18 Quality control); and

7. Case management and service coordination (assistance in obtaining services from government agencies and community service organizations).

### **Prenatal CEHI**

- Regular education students without a need for special education or related services cannot be referred to special education for instructional services on the basis of being pregnant. Regular education students who must be confined to the home or hospital bedside for pregnancy related issues are to be provided CEHI and other PRS components through the PRS Program.
- Students who are eligible for and receiving special education and related services and who are pregnant must be served collaboratively through both special education and the PRS programs. Special education eligibility and services do not change solely due to the student becoming pregnant including the need to hold ARD meetings attended by both PRS and special education staff to address the collaborative service. (See 4-14)
- On Campus PRS Services: A student that is pregnant may be served with PRS Support Service while she is pregnant and attending classes. Districts that serve prenatal students on campus with PRS Support Services receive the 2.41 PRS weighted funding (i.e., student should continue to be coded in the attendance accounting system as receiving PRS while being served on campus). (See introduction)

### **Prenatal Confinement**

- A student that is pregnant can be served at home or the hospital bedside when the pregnancy prenatal period prevents the student from attending classes. Districts that serve students during a prenatal confinement with PRS CEHI receive the 2.41 PRS weighted funding (i.e., student should continue to be coded in the attendance accounting system as receiving PRS while being at home).
- In all instances, the CEHI component of the PRS Program must be provided to the student during the prenatal confinement to receive the funding. (see Introduction)
- Providing the PRS support services during prenatal confinement is optional but may be necessary for the mental or physical health of the student to ensure that the student does not drop out of school.
- Documentation for each event of prenatal confinement must be obtained from a medical or nurse practitioner licensed to practice in the United States to document that a *medical necessity for confinement* has been determined to exist.

A medical release from a medical or nurse practitioner licensed to practice in the United States must be obtained to allow a prenatal student confined to the home or hospital bedside to return to campus **for any reason**.

1. There is no limit to the length of each event or the number of events a student can be provided when CEHI services are necessary during the pregnancy prenatal period. The length and number of times the student is placed on prenatal confinement CEHI services is dependent on the medical or nurse practitioner’s documentation for confinement and release.
2. Students who do not come to school and who do not receive CEHI (and or /SPED Homebound if SPED) must be counted absent in accordance with the Charts provided in this chapter.

### **Postpartum Confinement**

A student who delivered a live, aborted, or stillborn baby; suffered a miscarriage or death of a newborn; or placed her baby up for adoption can be served, beginning on the day of or day after delivery, for up to 6 consecutive weeks (weeks 1–6) at home or the hospital bedside with **6-week postpartum confinement or break-in-service postpartum confinement** services when the pregnancy postpartum period prevents the student from attending classes. Postpartum confinement can be extended for 4 weeks (weeks 7–10). However, under no circumstances will a student remain eligible for PRS postpartum confinement beginning on the first day of the eleventh week from the beginning date for the district (day of delivery or the day after delivery [see **Beginning and Ending Postpartum Confinement**]).

A responsible campus official must record, at the district, the date a student's pregnancy ended (e.g., the date of delivery).

Note that a student in the postpartum period of pregnancy is no longer eligible for the additional 2.41 weighted allotment under the PRS program when she returns to her regular service at a school or campus (exception: break-in-service postpartum confinement option)

### **Beginning and Ending Postpartum Confinement**

The beginning date for services is the day after delivery and the district must:

1. Consistently use the day after delivery for all students throughout the school year; and
2. Not alternate between the beginning date options.

**Six-Week Postpartum Confinement** is six consecutive weeks in length, beginning on the district beginning date (day of or day after delivery) and ending on the last day of week 6 from the beginning date for the district.

**Extended Postpartum Confinement** is four consecutive weeks in length, beginning on the first day of week seven and ending on the last day of week 10 from the beginning date for the district (day of or day after delivery).

### **Break-in-Service Confinement**

A student may divide the 10 weeks of PRS postpartum confinement into two periods in instances in which the infant remains hospitalized after delivery. This option is known as break-in-service confinement. It allows the student to use the first period of the postpartum confinement to recover from delivery (student recovery period). After the student is recovered, the student returns to school and saves the remainder of her eligible postpartum confinement time. When the baby is released from the hospital, the student goes back on postpartum confinement (baby recovery period) using the second period of postpartum confinement to care for her baby.

The maximum postpartum confinement (student recovery and baby recovery periods) must not exceed 10 weeks. All provisions for postpartum confinement and extended postpartum confinement must be met when using the break-in-service postpartum confinement option

### **Enrollment Procedures**

Any school age female may be enrolled in the PRS Program if they are eligible for Average Daily Attendance (ADA) and in the prenatal or postpartum periods of pregnancy. (see 9.7 Regular Education, special Education and PRS)

- The student's eligibility to receive PRS is verified by either:
  - A responsible campus official;
  - A medical or nurse practitioner or nurse midwife licensed to practice in the United States.

The date the student begins receiving PRS services is considered the entrance date (enrollment) into the PRS program.

### **Withdrawal Procedures**

A student is no longer eligible and must be withdrawn from the PRS program on either of the following, whichever comes first:

- The date PRS stopped and the student no longer receives services through the PRS program;
- The date during the postpartum period when the student returns early after delivery to attend her regular classes on a school campus;
- The date during the pregnancy postpartum period when no postpartum extension of services was authorized by a medical practitioner and the student reached the first day of the seventh week after delivery;

- The date during the pregnancy postpartum period when a postpartum extension was authorized by a medical practitioner and the student reaches the first day of the eleventh week after delivery;
- The date it is determined that the student was never pregnant. In this case, all coding for this student must be removed from the system even if the district provided the student with any support services through PRS.

**Eligibility and Attendance**

Any school age **female** student who is in the prenatal or postpartum period of pregnancy is eligible for **services** under the PRS Program. This includes students who are pregnant and/or deliver a live, aborted, or stillborn baby, suffer a miscarriage, or place the baby up for adoption.

Eligibility for PRS ends for the student in the postpartum period of pregnancy upon the student’s return to her regular service or a school campus or the first day of the eleventh week.

When a student in the pregnancy prenatal period is attending regular classes and receiving PRS Support Services, the student is PRS eligible and will generate the additional 2.41 PRS funding allotment.

When a student confined to the home in the prenatal or postpartum periods of pregnancy is receiving PRS CEHI (a required service of the PRS program), the student will remain eligible and continue to generate the additional 2.41 PRS funding allotment.

After a student has delivered and immediately before beginning CEHI a student is to be counted absent until the CEHI services begin with a certified teacher.

During the prenatal and/or postpartum periods of pregnancy attendance is taken on a weekly basis; Monday through Friday. A student is to be marked **absent for the entire week** if CEHI is not provided for a minimum of two hours in a week time-frame (or if the student does not come to school).

A student is to be counted present for:

- 2 days for 2 hours of instruction,
- 3 days for 3 hours of instruction,
- 4 or 5 days (entire week) for 4 hours of instruction.

**Documentation**

In order to claim PRS eligible days present for funding, documentation must be complete. All documentation supporting student eligibility must be on file for every student accumulating eligible PRS days present in the Student Detail Report. The documentation requirements are as follows.

- PRS and District and Campus Improvement Plans

Description of the PRS program and the services offered under the program in the district and campus improvement plan. District and Campus Improvement Plans must:

1. Include a description of the district's PRS program
2. Describe the specific services available to the student; and
3. Summarize the use of the compensatory education allotment for PRS in the strategies when the PRS Program is utilized to serve prenatal and postpartum students.

- Intake documentation recording date of initial contact with student regarding pregnancy.
- Affirmation (by a responsible campus official, a medical practitioner or nurse midwife licensed to practice in the United States, or a nurse practitioner) verifying the student's pregnancy which validates her eligibility to receive PRS.
- Certified teacher's log to include among other information: name of teacher, student ID numbers, actual time per visit (e.g. 10 a.m. until 12 p.m.), an adult signature obtained at each visit must be completed and on file in the student's folder. This applies to both prenatal and postpartum periods.
- Attendance documentation.
- For each student whose postpartum period was extended documentation from a medical practitioner licensed to practice in the United States verifying that the student was anticipated to be confined for an additional period of up to four calendar weeks.
- Documentation of the date when the student's pregnancy ended (e.g., date of delivery).
- A note from a medical practitioner must be obtained which requires the student to remain at home or in the hospital during the prenatal period.
- CEHI services can be only offered to students who are enrolled and reside within the International Leadership of Texas CHARTER SCHOOL boundaries.
- A copy of the ARD/IEP including modifications, for each special education student receiving CEHI.

Exception: Only students who have tuition waiver will be served during the CEHI period, if they are living out of district during this period.

- In the event that CEHI is offered but not provided to student, written documentation must be maintained to explain why the student was not provided CEHI.

- The principal or superintendent affirms the propriety of student eligibility when affidavits are signed.

## **Quality Control**

District personnel should identify a student as receiving PRS in the attendance accounting system as soon as services under the PRS program begin. All documentation must be obtained expeditiously and retained for audit purposes so that eligibility requirements are met.

When serving a pregnant SPED student, maintain the SPED and PRS records in the same file (e.g. Change of placement ARD proceedings).

During the prenatal period, a student should no longer be identified as receiving PRS if, for any reason, the services stop.

During the postpartum period, a student should no longer be identified as receiving PRS when the student returns to her regular service at her campus or at the end of the allowable postpartum period, whichever comes first.

At the beginning of each school year and at the end of each 6-week reporting period, the appropriate PRS program staff should verify the Student Detail Report to ensure that initial coding of PRS students is correct. All coding for remaining students who have not delivered should be “turned off” on the day after the last day of the school year. The coding should resume on re-entry in the fall if the student has not delivered.

Schedule modifications are an eligible service under the PRS program; however, these modifications must adhere to general attendance rules in order for PRS students to remain eligible for ADA. These requirements include attendance for at least two hours but fewer than 4 hours each day to be eligible for half-day ADA or at least four hours each day to be eligible for full-day ADA.

No student can be coded PRS unless CEHI is provided by your district. In the event that CEHI is offered but not provided to a student, your district must maintain documentation explaining why the student was not provided CEHI.

Monitor to assure that CTE funding is overridden during the CEHI period.



# **SPECIAL EDUCATION**

# SPECIAL EDUCATION PROGRAM

The following information is provided to support the International Leadership of Texas Charter School Data Quality Initiative and to report accurate and reasonable data for Special Education and related services. The Office of Special Education Services strives to ensure that district and campus personnel providing service to students with disabilities understand the PEIMS data collection process and how it affects funding. Campus accountability and compliance issues are reviewed to address the accuracy of data entries and the integrity of decision makers.

## Program Contact and Accountability

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Education Programs, the student’s eligibility folder shall be the primary source for compliance documentation. This highlights the importance of keeping all aspects of the student’s eligibility folder current, including the Record of Communications, Folder Access Sheet, Receipt of Procedural Safeguards, all ARD Committee documents, all FIE and eligibility documents, Confidential Student Reports of student assessment outcomes, Home Language Survey, referral documentation, and other required documentation. For more information, contact the Special Education Executive Director.

## Standard Procedures for Data Collection Responsibility

**Campus principals** shall designate a certified Educational Diagnostician on campus to address all questions regarding data entry coding for services to students with disabilities. State and Federal guidelines for eligibility, timelines and service requirements provided by the Texas Education Agency (TEA) and the Office of Special Education Programs (OSEP) should be followed to maintain data quality.

**Special Education Administrators** have the responsibility to routinely monitor the accuracy and completeness of data input for PEIMS reporting for each campus. Campus data reports may be printed from the Student Information System (SIS) and reviewed by the **Special Education Administrators** every six weeks. The reports should be reviewed within shorter time spans during targeted funding periods, such as the October Snapshot date or the last day of the spring instructional period.

Special Education Administrators under the direction of the Special Education Director should support the efforts to ensure accurate data input at the campus level for special education service.

The designated Campus Data Input Representative (ie. the Diagnostician or Speech Language Pathologist) should review special education data for accuracy weekly to ensure that required timelines for evaluation and ARD/IEP data are up-to-date.

## Eligibility Requirement or Mandated Procedures and Processes

Enrollment and eligibility requirements for special education services may be reviewed in Section IV of the *TEA Student Attendance Accounting Handbook (SAAH)*. Enrollment and eligibility requirements are clearly described in a number of examples that may occur at the campus. This handbook may be searched and downloaded from the TEA website. Access the *Student Attendance Accounting Handbook* to review the most recent handbook.

### **Documentation and Quality Control Required to Support Coding**

Documentation must be completed to meet timelines and an Admission, Review and Dismissal (ARD) meeting must be held to determine eligibility for special education services. Referencing the *TEA Student Attendance Accounting Handbook (SAAH)*, documentation and quality control issues are addressed at the end of each program section. Complete documentation for eligibility applies to students, age three (3) needing special education services and entering INTERNATIONAL LEADERSHIP OF TEXAS CHARTER SCHOOL for the first time. The following examples of statements for documentation are given:

In order to claim special education contact hours for funding, documentation must be complete. All documentation supporting student eligibility must be on file for every student accumulating special education eligible days present and/or every student reflecting a speech therapy indicator code and locator code on the Student Detail Report. Documentation requirements are as follows:

(7-1) Documentation to support the ARD committee findings and a copy of the IEP must be maintained in the student’s eligibility folder held at the campus and within e-documents in eStar and Skyward. These records must be uploaded to Skyward within 2 school days of the meeting and the PEIMS Data Specialist notified of the upload.

(7-2) Documentation to support the amount of time teachers served students in the homebound instructional arrangement/setting each week should be retained.

The following TEA examples of statements for Quality Control are:

(8-1) A student should be coded with the appropriate special education codes as soon as all documentation is in order and the student is receiving services.

(8-2) As soon as the student has been dismissed from special education, as documented by the ARD committee, the student should be withdrawn from special education in the attendance accounting system.

(8-3) At the beginning of each school year, the appropriate special education staff should verify the student Detail Reports to ensure initial coding is correct and agrees with the IEP.

For a complete review of documentation and quality control statements download and review Section IV Special Education of the TEA SAAH.

### **Admission, Review, and Dismissal Meeting and Assessment Procedures**

Admission, Review, and Dismissal meetings and assessments must be completed within the appropriate timelines to generate contact hours and funding for special education services. Campuses are informed to carefully and regularly review the ARD and assessment dates of all students eligible and receiving special education services to address timelines. ARDs and assessments must be current for students with disabilities so that the district can acquire the state funding allocated for the special education services.

**An ARD meeting must be held annually within 12 months to be considered current. An assessment or reevaluation that determines eligibility for services must be completed within a three year interval.** If an ARD date or an assessment date is out of its timeline, funding must be stopped on the Student Information System (SIS) and reinstated upon completion of the service.

If an ARD or assessment is not updated by the close of school in May, immediate steps must be taken to ensure that all ARDs and re-evaluations are made current and the correct coding re-entered on the student system. Coding must accurately reflect services at all times during the school year.

Campus Principals and Special Education support staff should ensure all ARD meetings and re-evaluations are held within the legal timeframe for students with disabilities on each campus.

### **Special Education Audit Preparation**

Special Education Staff at the campus level input critical data into the Student Management System. Entered data translate into funding for the school district and provide other key data to the state through PEIMS. It is the responsibility of the campus principal to ensure that all data submitted via PEIMS is reasonable and accurate. The data submitted via PEIMS can either trigger or be a component of an audit by the Texas Education Agency. Key data considerations appear below:

- **Instructional Setting Code** – Each student eligible for special education and related services must have an Instructional Setting code which accurately represents the extent to which the student receives special education services. There is always just one Instructional Setting code which is appropriate for the student’s set of services – there are no situations in which two or more codes may be appropriate. Assigning an Instructional Setting code must be done in compliance with the definitions of each Instructional Setting found in the *Student Attendance Accounting Handbook* and ARD/IEP decisions.
- **Eligibility Codes** – These were previously known as “Handicapping Conditions.” These codes specify the student’s area(s) of eligibility as determined by an appropriate evaluation and the Admission, Review, or Dismissal (ARD) Committee.
- **Annual ARD Date** – This is the date of the most recent full ARD which addresses up to one year’s Individualized Education Program for the student.
- **Full and Individual Education (FIE) Date** – This is the date of the most recent eligibility evaluation for the student. If the ARD Committee has chosen to continue eligibility by review of existing evaluation data (REED), then the date of that REED is used as the FIE Date.

- **Disability Funding Code/Effective Date** – This is the funding date the student is identified as having an IDEA eligible disability. This is also the date the IDEA disability is removed when the student is dismissed from service.
- **Instructional Setting Code/Effective Date** – This is the funding date during the current school year that the student first received special education services for the disability in compliance with a current ARD and FIE. If the student’s ARD and/or FIE is/are out-of-date, then Effective Date is listed to show no instructional setting (00) until such time that both the ARD and evaluation are in compliance.
- **Speech Therapy Code/Effective Date** – Speech funding codes, 0, 1, or 2 apply when the student is identified with Speech Impairment as a disability. See instructions for Instructional Setting Code/Effective Date above.
- **Preschool Program for Children with Disabilities (PPCD)-Effective Date** – The PPCD funding indicator is selected for students ages three – five only who have an eligible IDEA disability and are receiving special education services.

To facilitate the accuracy of Special Education data, a PEIMS data sheet should be completed at each ARD meeting including initial ARD meetings, transfer/temporary meetings, and annual reviews.

In the event of an audit by the Texas Education Agency or the U. S. Department of Education Office of Special Education Programs, the student’s eligibility folder shall be the primary source for compliance documentation. This highlights the importance of keeping all aspects of the student’s eligibility folder current, including the Record of Communications, Folder Access Sheet, Receipt of Procedural Safeguards, all ARD Committee documents, all FIE and eligibility documents, Confidential Student Reports of student assessment outcomes, Home Language Survey, referral documentation, and other required documentation. For more information, contact the Special Education Director.

## 504 PROGRAM

The following information is provided to support the International Leadership of Texas Charter School Data Quality Initiative and to report accurate and reasonable data for 504 and related services. The Office of Student Services

strives to ensure that district and campus personnel providing service to students with disabilities understand the PEIMS data collection process and how it affects funding. Campus accountability and compliance issues are reviewed to address the accuracy of data entries and the integrity of decision makers.

**Program Contact and Accountability**

Shannon Urbina; Executive Director of Special Populations ..... surbina@iltexas.org

**504 Records**

According to the Office of Civil Rights (OCR):

Section 504 is a federal law designed to protect the rights of individuals with disabilities in programs and activities that receive Federal financial assistance from the U.S. Department of Education (ED). Section 504 provides: "No otherwise qualified individual with a disability in the United States . . . shall, solely by reason of her or his disability, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance . . . ."

(<http://www2.ed.gov/about/offices/list/ocr/504faq.html>)

- The Special Populations Department will maintain the official 504 Records and all updates once received from the 504 Campus Coordinator. Another copy of the 504 Record and updates must be maintained on the campus.
- It is the responsibility of the Campus PEIMS Clerk to input the 504 Records based upon documentation received by the 504 Campus Coordinator. Without exception, Campus PEIMS Clerks MUST receive written documentation for ALL student entries before any 504 updates can take place in the Student Management System.
- The 504 Coordinator will need to maintain a working copy of 504 Record to verify that students have been coded correctly within the Student Management System.
- 504 Records need to be input into the Special Populations Data Management Program and Skyward and updated within 2 school days of the 504 meeting.
- The 504 Campus Coordinator will need to verify all 504 Record entries within 5 school days following Snapshot, at the beginning the second semester, and at year end.

To facilitate the accuracy of 504 data entered in PEIMS, a PEIMS data sheet should be completed at each 504 meeting conducted.

# **TITLE I**

# TITLE I, PART A RESPONSIBILITY

## Program Contact and Accountability

Krystal Lovato, Executive Director of Federal Programs, [KLovato@ILTexas.org](mailto:KLovato@ILTexas.org)

### Definition

The Title I Campus Contact Person must provide personnel with names and coding information of students who are being served in the program. In no case should data entry/clerical personnel be responsible for determining whether a student is Title I eligible.

Principals must ensure that reports from the Texas Education Agency (TEA), which reflect actual Public Education Information Management System (PEIMS) data, are compared to campus reports for reasonableness and accuracy.

### Title I, Part A, Schoolwide and Targeted Assistance Programs

Title I, Part A, schools have either **school wide or targeted assistance** programs. A **school wide program** permits a school to use funds from Title I, Part A, and other federal education program funds and resources to upgrade the **entire educational program of the school** in order to raise academic achievement for **all** the students. A Title I, Part A, **targeted assistance program** uses funds **only** for supplementary educational services for **low-income students** who are failing or at risk of failing to meet state standards. **All campuses within are part of a school wide program and, therefore, all students within campuses are to be labeled Title I, Part A.**

### Data Components

All students enrolled on a Title I, Part A, schoolwide campus must have a Title I, Part A Student Data record also referred to as a **461** record.

### Schoolwide Campus

The only data elements that are to be completed for the PEIMS Fall submission for Title I, Part A, schoolwide campus students are:

- INPUT-RECORD-TYPE-CODE (the record type code is 461)
- DISTRICT-ID (the district ID is 057848)
- STUDENT-ID (the student ID generated by the Student Management System at the time of enrollment or should be provided from transferring campus if a student is coming from a campus within the state of Texas)
- CAMPUS-ID-OF-ENROLLMENT (The campus ID of enrollment is the district ID and the campus



number.)

- TITLE-1-PART-A-INDICATOR-CODE (The indicator code is “6” for Title I, Part A, school wide campuses. A “6” was pre-coded for the returning students and indicates that the student attended a Title I, Part A, school wide campus the prior school year.)

**Eligibility Requirements**

Section 1113 of No Child Left Behind (Public Law 107-110) contains the requirements for identifying eligible school attendance areas and selecting the eligible areas that will participate in the Title I, Part A, program. A school district may use Title I, Part A, funds only in eligible school attendance areas.

A school district must use the same measure of poverty uniformly throughout the district to:

- Identify eligible school attendance areas;
- Determine the ranking of each area; and
- Determine the allocation for each area.

The school district must select a poverty measure from the following options:

- The number of children ages 5 to 17 in poverty as counted by most recent census data approved by the Secretary [in this case, the 2010 Census];
- The number of children eligible to receive free or reduced-price lunch under the Richard B. Russell National School Lunch Act;
- The number of children in families receiving assistance under the Temporary Assistance for Needy Families (TANF) program;
- The number of children eligible to receive medical assistance under Medicaid program; or
- A composite of any of the above indicators.

Of the four measures of poverty that the statute permits a school district to use for identifying eligible school attendance areas and allocating funds, eligibility for free or reduced-price lunch is the measure most frequently used.

# **STUDENT HEALTH**

## **HEALTH INFORMATION**

### **DRUG-FREE SCHOOL**

ILTexas is a drug-free environment. All students are prohibited from the possession, use, sale, distribution, transmittal; or attempt to possess, use, sell, distribute, transmit; or being under the influence of a controlled substance or dangerous drug (as defined by law) or alcohol or any alcoholic beverage, or any volatile chemical substance, or any intoxicant or behavior-altering drug on school premises or off school premises at a school-related activity, function, or event. In accordance with the Student Code of Conduct, students may be disciplined for any alcohol and drug related offenses. All individuals will be referred to appropriate law enforcement officials for criminal prosecution.

### **TOBACCO-FREE SCHOOL NOTICE**

Smoking (including electronic cigarettes, cigars, and pipes) and using tobacco products is prohibited in school buildings, vehicles, or on or near school property, or at school-related or school-sanctioned events off school property. Students may not possess tobacco products at any of the locations or activities listed above. Student violators are subject to possible prosecution, as allowed by law, as well as the disciplinary terms of the Student Code of Conduct.

### **ASBESTOS MANAGEMENT PLAN**

All school facilities have been inspected for asbestos by a licensed Asbestos Hazard Emergency Response Act (“AHERA”) inspector. An Asbestos Management Plan has been created for each ILTexas campus in accordance with federal regulations. Parents may view the Asbestos Management Plan by contacting the Principal. Copies of the management plan are also available at a reasonable charge.

### **BACTERIAL MENINGITIS INFORMATION**

State law requires ILTexas to provide the following information: What is bacterial Meningitis?

Meningitis is an inflammation of the membranes that surround the brain and spinal cord. Meningitis can be caused by viruses, parasites, fungi and bacteria. Viral meningitis is common and most people recover fully. Parasitic and fungal meningitis are very rare. However, bacterial meningitis is very serious and may involve complicated medical, surgical, pharmaceutical and life support management.

What are the symptoms of bacterial meningitis?

Someone with meningitis will become very ill. The illness may develop over one or two days, but it can also rapidly progress in a matter of hours. Not everyone with meningitis will have the same symptoms. Children (over two years old) and adults with bacterial meningitis commonly have a severe headache, high fever, and neck stiffness. Other symptoms might include nausea, vomiting, seizures, discomfort looking into bright lights, confusion and sleepiness and lethargy. In both children and adults, there may be a rash of tiny, red-purple spots or purple patches on the skin. These can occur anywhere on the body. The more symptoms, the higher the risk, so when these symptoms appear seek immediate medical attention.

The diagnosis of bacterial meningitis is based on a combination of symptoms and laboratory results. How serious is bacterial meningitis?

Bacterial meningitis is a serious, potentially deadly disease that can progress extremely fast. If it is diagnosed early

and treated promptly, the majority of people make a complete recovery. However, in some cases it can be fatal or a person may be left with permanent severe health problems or disability. How is bacterial meningitis spread?

Fortunately, none of the bacteria that cause meningitis are as contagious as diseases like the common cold or the flu, and they are not spread by casual contact or by simply breathing the air where a person with meningitis has been. They are spread when people exchange saliva (such as by kissing, or by sharing drinking containers, food, utensils, cigarettes, toothbrushes, etc.) or come in contact with respiratory or throat secretions (such as by coughing or sneezing).

The germ does not cause meningitis in most people. Instead, most people become carriers of the germ for days, weeks, or even months. The bacteria rarely overcome the body's immune system and cause meningitis or another serious illness.

How can bacterial meningitis be prevented?

Maintaining healthy habits, like getting plenty of rest, can help prevent infection. Using good health practices such as covering your mouth and nose when coughing and sneezing and washing your hands frequently with soap and water can also help stop the spread of the bacteria. It's a good idea not to share food, drinks, utensils, toothbrushes, or cigarettes.

Limit the number of persons you kiss.

There are vaccines available to offer protection from some of the bacteria that can cause bacterial meningitis.\* The vaccines are safe and effective (85–90 percent). They can cause mild side effects, such as redness and pain at the injection site lasting up to two days. Immunity develops within seven to ten days after the vaccine is given and lasts for from three to five years.

\* Please note that the Texas Department of State Health Services ("TDSHS") requires at least one meningococcal vaccination for grades 7 through 12, and state guidelines recommend this vaccination be administered between age 11 and 12, with a booster dose at 16 years of age. Also note that entering college students must show, with limited exception, evidence of receiving a bacterial meningitis

vaccination within the five-year period prior to enrolling in and taking courses at an institution of higher education. Please see the school nurse for more information, as this may affect a student who wishes to enroll in a dual credit course taken off campus.

What should you do if you think you or a friend might have bacterial meningitis? You should seek prompt medical attention.

Where can you get more information?

Your family doctor and the staff at your local or regional health department office are excellent sources for information on all communicable diseases. You may also call your local health department or Regional Texas Department of Health office to ask about meningococcal vaccine. Additional information may also be found at the web sites for the Centers for Disease Control and Prevention: [www.cdc.gov](http://www.cdc.gov) and the Texas Department of State Health Services ("DSHS"): <https://www.dshs.tx.us/idcu/disease/meningitis/>.

## **DISPENSING OF PRESCRIPTION MEDICATIONS AT SCHOOL**

International Leadership of Texas recognizes medication orders provided by health-care professionals (MD, DO, DDS, APN, PA, etc.) that are licensed by the State of Texas and have authority to write prescriptions.

Medication must be filled by a pharmacist licensed by the State of Texas. In accordance with the Texas Board of Nursing, Nurse Practice Act, ILTexas will not administer medications prescribed or fulfilled in Mexico.

All prescriptions MUST be in the ORIGINAL and be properly labeled container. Prescription labels must include the student's name, name of medication, date filled, dosage, how the medication is administered, time/or frequency to give the medication, and physician's name printed on the bottle. All prescriptions shall be accompanied by a "Permission to Administer" form and signed by the parent. It must state the instructions as the prescription label and must and include the parent's daytime phone numbers.

Permission forms are available through the clinic and are active for one school year. If a prescription changes, the parent/guardian must complete a new permission form.

- \* Parents should deliver medications to the clinic or nurse's office for their children. Please do not send medications to school with the student.
- \* Paperwork must be completed and signed by the parent/guardian and prescribing physician.
- \* Students K-5 should NEVER have any medications in the backpacks, purses, or on themselves.
- \* Medication will be secured, stored and administered only in the nurse's office.

## **DISPENSING OF OVER-THE-COUNTER (OTC)/NON-PRESCRIPTION MEDICATIONS AT SCHOOL**

International Leadership of Texas does not provide OTC (Over-the-counter) or prescription medication for students. Medication packaged as a physician's sample or OTC must be provided by the parent/guardian and accompanied by a written, signed prescription by the doctor, including all information listed above. Prescription and OTC medications will only be given if the parent's and physician's current phone numbers are on file in the nurse's office.

Non-prescription medication must be provided by the parent or guardian labeled with the student's name and in the original manufacturer's container. OTC medications will be kept in the nurse's office ONLY if a medication administration form signed by the physician is provided.

NO aspirin will be given to students. Herbal, experimental, trial or medications not approved by the FDA will not be administered to students, unless the medication is required by the student's Individualized Education Program ("IEP") or Section 504 plan for a student with disabilities.

The nurse keeps no medications of any kind in stock.

Any student found taking medication or giving medication to another student will be subject to school disciplinary action.

## **ASTHMA AND ANAPHYLAXIS MEDICATIONS**

Asthma and anaphylaxis are life-threatening conditions, and students with those conditions are entitled to possess and self-administer prescription medication while on school property or at school-related events. Student possession and self-administration of asthma or anaphylaxis medication at school requires the

student to demonstrate his or her ability to self-administer the medication to the student's physician or other licensed

health care provider and the school nurse, if available. Requirements also include written authorization from the student’s parent and physician or other licensed health care provider on file in the school office indicating the student is capable of independently administering his or her own asthma or emergency anaphylaxis medication. Medication in a student’s possession must be in an original container with a prescription label. Please note that most pharmacies will place a label on the inhaler device upon request.

**SEVERE ALLERGIC REACTION**

It is the responsibility of the parents to ensure that the nurse is aware of any student’s hypersensitivities to food/environment/insects. An Allergy Action Plan is advised for any student with a known history of anaphylactic reaction and is available from the school nurse. Students requiring medication for the treatment of an allergic reaction (Examples of medication include Benadryl in a lotion or pill form, Epipen, or topical creams) must have a signed Allergy Action Plan and a “Permission to Administer” form on file in the nurse’s clinic.

**COMMUNICABLE DISEASES**

To protect other students from contagious illnesses, students infected with certain diseases are not allowed to come to school while contagious. Parents of students with a communicable or contagious disease should notify the Campus Principal or designee so that other students who might have been exposed to the disease can be alerted. School authorities will report those students who are suspected of having a reportable condition. A list of reportable conditions can be found on the DSHS website: <http://www.dshs.state.tx.us/idcu/investigation/conditions/>.

Any student excluded from school attendance for reason of communicable disease may be readmitted by one or more of the following methods, as determined by the local health authority:

- \* Certificate of the attending physician, advanced practice nurse, or physician assistant attesting that the child does not currently have signs or symptoms of a communicable disease or to the disease’s non-infectiousness in a school setting;
- \* Submitting a permit for readmission issued by a local health authority; or
- \* Meeting readmission criteria as established by the commissioner of health.

**IMMUNIZATIONS**

The State of Texas requires that every child in the state be immunized against vaccine preventable diseases caused by infectious agents in accordance with an established immunization schedule.

To determine the specific number of doses that are required for your student, please read “2015–2016 Texas Minimum State Vaccine Requirements for Students Grades K–12.” For specific immunization requirements, please visit the Texas Department of State Health Services website at <http://www.dshs.state.tx.us/immunize/school/>.

Proof of immunization may be personal records from a licensed physician or public health clinic with a signature or rubber-stamp validation.

**Provisional Enrollment**

A student can be enrolled provisionally for no more than 30 days if her or she transfers from one Texas school to another, and is awaiting the transfer or the immunization record.

A student may be enrolled provisionally if the student has an immunization record that indicates the student has received at least one dose of each specified age-appropriate required vaccine. To remain enrolled, the student must complete the

required subsequent doses in each vaccine series on schedule and as rapidly as is medically feasible and provide acceptable evidence of vaccination to the school. ILTexas shall review the immunization status of a provisionally enrolled student every 30 days to ensure continued compliance in completing the required doses of vaccination. If at the end of the 30-day period, a student has not received

a subsequent dose of vaccine, then the student is not in compliance and ILTexas shall exclude the student from school attendance until the required dose is administered.

A student who is homeless, as defined by the McKinney Act (42 U.S.C. § 11302), shall be admitted temporarily for 30 days if acceptable evidence of vaccination is not available. ILTexas shall promptly refer the student to appropriate public health programs to obtain the required vaccinations.

#### **Exclusions from Immunization Requirements**

Exclusions from immunization requirements are allowable on an individual basis for medical reasons, reasons of conscience (including a religious belief), and active duty with the armed forces of the United States.

To claim exclusion for medical reasons, the student must present a statement signed by the student’s physician (M.D. or D.O.), duly registered and licensed to practice medicine in the United States who has examined the student, in which it is stated that, in the physician’s opinion, the vaccine required is medically contraindicated or poses a significant risk to the health and well-being of the student or any member of the student’s household. Unless it is written in the statement that a lifelong condition exists, the exemption statement is valid for only one year from the date signed by the physician.

To claim an exclusion for reasons of conscience, including a religious belief, a signed Texas Department of State Health Services (“TDSHS”) affidavit must be presented by the student’s parent, stating that the student’s parent declines vaccinations for reasons of conscience, including because of the person’s religious beliefs. The affidavit will be valid for a period of two years. The form affidavit may be obtained by writing the TDSHS Immunization Branch (MC 1946), P.O. Box 149347, Austin, Texas 78714-9347, or online at <https://webds.dshs.state.tx.us/immco/default.aspx>. The form must be submitted to the Campus Principal within 90 days from the date it is notarized. If the parent is seeking an exemption for more than one student in the family, a separate form must be provided for each student. Students, who have not received the required immunizations for reasons of conscience, including religious beliefs, may be excluded from school in times of emergency or epidemic declared by the commissioner of public health. To claim exclusion for armed forces, the student must prove that he or she is serving on active duty with the armed forces of the United States.

#### **Immunization Records Reporting**

ILTexas’ record of a student’s immunization history, while private in most instances, may be inspected by the Texas Education Agency, local health departments, and TDSHS and transferred to other schools associated with the transfer of the student to those schools.

#### **STEROID NOTICE**

ILTexas does not permit steroid use. A notice shall be posted in a conspicuous location in the school gym or in each other place in a building where physical education classes are conducted.

### **LAW ENFORCEMENT AGENCIES**

#### Questioning of Students

When law enforcement officers or other lawful authorities wish to question or interview a student at school, the Principal will cooperate fully regarding the conditions of the interview if the questioning or interview is part of a child abuse investigation.

### **STATE-MANDATED SCHOOL HEALTH SCREENING PROGRAM**

Students are screened according to the Texas Board of Education Rules and the school health programs mandated by the Texas Department of State Health Services.

### **DYSLEXIA AND RELATED DISORDERS**

From time to time, students may be tested and, where appropriate, treated for dyslexia and related disorders in accordance with programs, rules, and standards approved by the state. Parents will be notified should ILTexas determine a need to identify or assess a student for dyslexia and related disorders.

### **FITNESS TESTING**

According to requirements under state law, ILTexas will annually assess the physical fitness of students. ILTexas is not required to assess a student for whom, as a result of disability or other condition identified by rule or law, the assessment exam is inappropriate.

### **VISION AND HEARING SCREENING**

All children enrolled in Texas schools must be screened for possible vision and hearing problems in accordance with regulations issued by the Texas Department of State Health Services. Students in certain grade levels identified by state regulations shall be screened for vision and hearing problems annually.

Screening records for individual students may be inspected by the TDSHS or a local health department, and may be transferred to another school without parental consent.

Exemption: A student is exempt from screening requirements if screening conflicts with the tenets and practices of a recognized church or religious denomination of which the individual is an adherent or a member. To qualify for the exemption, the individual or, if the individual is a minor, the minor's parent, managing conservator, or guardian, must submit to the Campus Principal or designee on or before the day of admission an affidavit stating the objections to screening.

### **SPINAL SCREENING**

All children in grades 6–9 must be screened for abnormal spinal curvature before the end of the school year. The screening requirement for students entering grade six or nine may be met if the child has been screened for spinal deformities during the previous year.

A parent who declined participation in the spinal screening provided by ILTexas must submit to the Campus Principal or designee documentation of a professional examination which includes the results of a forward-bend test. This documentation must be submitted to ILTexas during the year the student is scheduled for screening or, if the



professional exam is obtained during the following summer, at the beginning of the following school year.

Exemption: A student is exempt from screening if the screening conflicts with the tenets and practices of a recognized church or religious denomination of which the individual is an adherent or member. To qualify for the exemption, the student's parent, managing conservator, or guardian must submit to the Campus Principal or designee on or before the day of the screening procedure an affidavit stating the objections to screening.

### **TEXAS RISK ASSESSMENT FOR TYPE II DIABETES**

All first, third, fifth, and eighth grade students will be screened for a skin marker that may indicate high levels of insulin in the blood which results from insulin resistance. If the screening reveals abnormal results, the parent/guardian is notified through the referral process.

### **REFERRALS**

Referrals should be returned to the school nurse as soon as possible after a specialist is seen. When referrals are not returned to the campus, the school nurse follows up with parents/guardians to determine whether or not the student was seen and treated. The State of Texas requires each school district to report screening results at the end of each school year.

For questions regarding any of the above health policies, please refer to your campus Nurse.

## **INTERNATIONAL LEADERSHIP OF TEXAS FOOD ALLERGY NOTIFICATION FORM**

Dear Parents,

ILTexas is required by law to request, at the time of enrollment, that the parent or guardian of each student attending an ILTexas campus disclose the student’s food allergies. This form will satisfy this requirement.

This form allows you to disclose whether your child has a food allergy or severe food allergy that you believe should be disclosed in order for ILTexas to take necessary precautions for your child’s safety. “Severe food allergy” means a dangerous or life-threatening reaction of the human boy to a food borne allergen introduced by inhalation, ingestion, or skin contact that requires immediate medical attention.

Please list any foods to which your child is allergic or severely allergic, as well as the nature of your child’s allergic reaction to the food. ILTexas will contact you for a note from your physician if your child has food allergies. Your child must have an EpiPen prescribed to help in the event of an emergency.

Food: \_\_\_\_\_ Nature of allergic reaction to the food: \_\_\_\_\_

ILTexas will maintain the confidentiality of this form and the information provided above, and may disclose the information to teachers, school counselors, school nurses, and other appropriate school personnel only within the limitations of the Family Educational Rights and Privacy Act (“FERPA”) and Board policy. ILTexas will maintain this form as part of your child’s student record.

Student Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Grade: \_\_\_\_\_ Parent Work Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Parent/Guardian Name: \_\_\_\_\_  
\_\_\_\_\_  
Date: \_\_\_\_\_  
Parent/Guardian Signature: \_\_\_\_\_ Date form received by ILTexas: \_\_\_\_\_

# Homebound Services

## **Instructional Arrangements-Homebound Instruction Board Policy**

### **General Instruction**

Consistent with TEA’s *Student Attendance Accounting Handbook* (“SAAH), a student to be confined for a minimum of four weeks to a hospital or homebound for medical reasons specifically documented by a physician licensed to practice in the United States may be eligible for general education homebound services. The parent’s request for services shall be made through the Principal in accordance with the SAAH and administrative procedures.

The Principal or designee shall convene a placement committee composed of at least a campus administrator, a teacher of the student, and the parent or guardian of the student to consider the necessity of providing general education homebound instruction to the student. If the committee determines that such instruction is appropriate, the committee shall determine the type and amount of instruction to be provided and, when the student is able to return to the regular educational setting, the length of the transition period based on current medical information.

**Special Education**

For special education students, the ARD committee shall determine the type and amount of instruction to be provided and, when the student is able to return to regular educational setting, the length of the transition period based on current medical information.

**Documentation of Services**

The school shall maintain, in accordance with administrative procedures, full documentation about students receiving homebound services.

**Procedures for Determining Student Eligibility for General Education Homebound (GEH) Services**

**Overview of General Education Homebound (GEH) services**

General Education Homebound services are instructional services that are provided in a hospital or in the home by a qualified teacher to a student enrolled in International Leadership of Texas and who has a medical condition that prevents the student from attending school for a minimum of four weeks. During this period of time, the student is confined to the

hospital bed or at home. The final decision regarding whether or not these services will be provided is made by the campus GEH committee.

**Contacts**

Each campus has a designated GEH Coordinator. For further information, call the campus directly and ask to speak to the GEH Coordinator or the Principal. International Leadership of Texas also has a District GEH Coordinator who can be reached by calling 972-479-9078. Parents should always contact their child’s school first to discuss GEH services and any issues related to their child’s education.

**Determining eligibility for GEH services**

Students who satisfy the following criteria may be eligible for general education homebound services:

1. The student is expected to be confined at home or to a hospital for a minimum of four weeks; **AND**
2. The student is confined at home or hospital bed for medical reasons only; **AND**
3. The student’s medical condition is documented by a physician licensed to practice in the United States.

**NOTE:** In making an eligibility decision, the GEH Committee must consider the physician’s information. However, the physician’s note/information *is not* the sole determining factor in the committee’s decision-making process. Instead, *all* relevant information will be considered.

If appropriate, every attempt should be made to accommodate and serve the student on campus when practically possible. The student’s parent/guardian should continue picking up all assignments and remain current with all class work pending a determination of eligibility for homebound services.

**GEH Committee members**

A student’s GEH Committee should include, but is not limited to:

- A campus administrator
- A teacher of the student; and
- A parent or guardian of the student.

A student’s GEH Committee will convene to review relevant school data and medical information regarding the student’s situation to determine whether or not the student requires homebound instruction. If GEH services are to be provided, it is the GEH Committee’s responsibility to specify the type(s) of instruction (for all subjects, including electives) and the amount of weekly time that a qualified teacher will provide such lessons. The committee will document each of its decisions on International Leadership of Texas GEH forms.

**Recording attendance**

General education students served through the GEH program will earn eligible days in attendance based on the number of hours the student is served by the assigned teacher at home or in the hospital each week.

One hour of instruction equals one day in attendance *for the first three hours* of GEH instruction. When *four or more hours* of GEH instruction are provided, the student earns an entire week of eligible days of attendance. The following chart will be used to calculate eligible days present:

Amount of Time Served per Week	Eligible Days Present Earned per Week

1 hour	1 day present
2 hours	2 days present
3 hours	3 days present
4 hours	4 days present (if the week is a 4-day week) 5 days present (if the week is a 5-day week)
More than 4 hours	4 days present (if the week is a 4-day week) 5 days present (if the week is a 5-day week)

Once GEH services begin, the GEH teacher will complete a homebound service log on a weekly basis. This form will be provided to the campus attendance clerk and the PEIMS Coordinator to record on behalf of the student.

**Reconvening GEH Committee**

The GEH Committee may meet periodically to re-evaluate the student’s condition and possible continued need for services. The committee should also meet again to re-evaluate a *new* physician’s form and the need for homebound services after six(6) weeks of services have been provided.

The committee shall also reconvene at the end of the service period (as documented by the student’s licensed physician) to review current physician information and to make decisions regarding whether or not to continue or stop GEH services.

Prior to this meeting, the parent must have the doctor complete a “Physician’s Release” in order for the student to return to school. The GEH Committee should also determine if a transition period is necessary.

Should a transition period be needed, the GEH Committee should document all of the following:

1. The length of time of the transition period;
2. The amount of time the student will be served in both settings (homebound and the classroom) during the transition period; and
3. The effective date of when the student is expected to return to the classroom on a full-time basis.

**Dismissal from GEH program**

Dismissal from the GEH program will proceed in accordance with the following steps:

1. If the student’s physician has not provided a specific return date, the physician must first complete a “Physician’s Statement-Homebound Services Release” form.
2. The homebound teacher will notify the campus GEH Coordinator when a student is being released from homebound instruction for entry back into school.
3. No homebound instruction may occur after the dismissal date.
4. The GEH Coordinator will notify the student’s teacher(s) and the campus attendance clerk when the student has been dismissed and will return to the regular classroom setting.
5. Homebound instruction is usually considered a temporary arrangement and cannot be considered as equivalent to classroom instruction. It is imperative that students return to the classroom as soon as practical. This is usually

dictated by the student's doctor. However, in unusual cases where the student's medical condition is in doubt, International Leadership of Texas may request a second doctor's opinion at its own expense and call another GEH Committee meeting to consider dismissing the student from GEH services depending on the results of that examination.

### **Special Education Homebound Guidelines**

In-home/bedside educational services for special education students are provided in accordance with International Leadership of Texas policies, procedures, and these guidelines. It is the responsibility of each campus Principal to designate personnel who are responsible for processing requests for homebound services in a timely fashion.

#### **Eligibility**

To qualify for homebound services, the student must meet eligibility requirements as documented in the current *Student* 156

*Attendance Accounting Handbook* (“SAAH”). Presently, these requirements are that the student:

1. Is eligible for special education and related services as determined by an ARD Committee;
2. Is expected to be confined at home or hospital bedside for a minimum of four weeks(the weeks need not be consecutive);
3. Is confined at home or hospital bedside for medical reasons only; and
4. Has a medical condition documented by a physician licensed to practice in the United States.

**Referral Process**

A requested for special education homebound services shall be made through the Principal. A homebound referral does not automatically mean that the ARD Committee will recommend homebound services. In making eligibility and placement decision the ARD Committee must consider information provided by the student’s physician; however, such information is not the sole determining factor in the ARD Committee’s decision-making process. International Leadership of Texas needs to make an appropriate effort to accommodate the student at the school depending on the student’s medical need and doctor’s information.

Parents/students should continue picking up all assignments and remain current with all the work pending a determination of eligibility for special education homebound services.

**Least restrictive environment requirements**

International Leadership of Texas must ensure that;

1. To the maximum extent appropriate, children with disabilities are educated with children who are nondisabled; and
2. Special classes, separate schooling, or other removal of children with disabilities from the regular educational environment occurs only if the nature of severity or the disability is such that education in regular classes with the use of supplementary aids and services cannot be achieved satisfactory.

Homebound is the most restrictive educational placement for students. Documentation should support all efforts made to accommodate and support the student with non-disabled peers and in the regular educational environment.

Parents/guardians need to know that an ARD Committee cannot consider homebound services until necessary forms are completed and returned to the Principal or designee.

**ARD Committee**

For students already in special education who require homebound services, the assessment staff gathers information from school records, parent/guardian, and the student’s FIE in order to determine the student’s current functioning level and educational needs. The ARD Committee reviews written input from the student’s and determines if homebound services are appropriate.

When the student’s placement determined to be homebound, the homebound teacher’s responsibilities during the ARD include:

1. Provide input for necessary accommodations
2. Provide the parent/guardian with relevant information concerning the special education homebound services program (days of instruction, times and assignments and grading responsibility)
3. Verify telephone numbers and directions to the student’s home.

**Attendance requirements**

The homebound teacher will notify the attendance clerk of student absences at the end of each week. Special education homebound students served at home will earn eligible days present in accordance with the SAAH. Generally, attendance is



based on the following chart:

Amount of Time Served per Week	Eligible Days Present Earned per Week
1 hour	1 day present
2 hours	2 days present
3 hours	3 days present
4 hours	4 days present (if the week is a 4-day week) 5 days present (if the week is a 5-day week)
More than 4 hours	4 days present (if the week is a 4-day week) 5 days present (if the week is a 5-day week)

When absences are related to the medical diagnosis, homebound services will be offered as per the SAAH.

**Dismissal from special education homebound services**

There must be an ARD at the end of the homebound request period to either:

1. Dismiss the student at the end of the projected time; or
2. To continue the services. In this case, the ARD Committee must review a new statement from the student’s physician.

If dismissal occurs, the diagnostician or campus designee will notify the campus attendance clerk and the student’s teacher(s) of the student’s return to campus.

**General Education Homebound Attendance Reporting**

The following procedures apply when reporting attendance for students served by the International Leadership of Texas General Education Homebound (“GEH”) services:

1. Attendance will be awarded following the guidelines of the current year’s Student Attendance Accounting Handbook.

2. The Campus GEH Coordinator will notify the PEIMS clerk and campus attendance clerk when a student begins homebound services.
3. The Campus GEH Coordinator will notify the campus teachers when the student begins homebound services.
4. The homebound teacher will complete the *General Education Homebound Instruction Log* and submit the log on a weekly basis to the attendance clerk. The attendance clerk uploads the instruction log to the student’s attendance notes.
5. The *Homebound Instruction Log* will reflect the school calendar week by week so that available instructional days are easily identified.
6. Total weekly instructional time and total weekly days in attendance are summarized at the end of each instructional week.
7. If absences are reported for any given day, a notation as to the reason should be made in the Notes/Other section of the log.
8. While parents/guardians are asked to arrange medical appointments around the homebound teacher’s schedule, absences are often incurred because the student is too ill to attend to instruction. The homebound teacher may be able to rearrange instruction for that week but, if unable to do so, absences will be recorded according to the instructional hours delivered. GEH services hours may not be accumulated and carried forward from one week to the next or applied to a previous week.
9. GEH students served at home will earn eligible days present based on the Student Attendance Accounting Handbook. Generally, attendance is based on the following chart:

<b>Amount of Time Served per Week</b>	<b>Eligible Days Present Earned per Week</b>
1 hour	1 day present
2 hours	2 days present
3 hours	3 days present
4 hours	4 days present (if the week is a 4-day week) 5 days present (if the week is a 5-day week)
More than 4 hours	4 days present (if the week is a 4-day week) 5 days present (if the week is a 5-day week)

## **DATA QUALITY RESOURCES**

### **Websites**

TEA

<http://www.tea.state.tx.us/>

### **Legacy PEIMS Data Standards**

<http://ritter.tea.state.tx.us/peims/standards/weds/>

### **TEA Student Attendance Accounting Handbook**

[http://tea.texas.gov/Finance\\_and\\_Grants/State\\_Funding/Additional\\_Finance\\_Resources/Student\\_Attendance\\_Accounting\\_Handbook/](http://tea.texas.gov/Finance_and_Grants/State_Funding/Additional_Finance_Resources/Student_Attendance_Accounting_Handbook/)

### **TEASE / Edit+**

<https://seguin.tea.state.tx.us/apps/logon.asp>

### **TEAL**

<https://pryor.tea.state.tx.us/>

### **Texas Education Code**

<http://www.statutes.legis.state.tx.us/?link=ED>

### **Texas Student Data System (TSDS)**

[http://tea.texas.gov/Reports\\_and\\_Data/Data\\_Submission/Texas\\_Student\\_Data\\_System\\_%28TSDS%29/](http://tea.texas.gov/Reports_and_Data/Data_Submission/Texas_Student_Data_System_%28TSDS%29/)

### **The Network**

<http://www.txcharternetwork.org/>

# Forms

**INTERNATIONAL LEADERSHIP OF TEXAS**  
**FOOD ALLERGY NOTIFICATION FORM**

Dear Parents,

ILTexas is required by law to request, at the time of enrollment, that the parent or guardian of each student attending an ILTexas campus disclose the student’s food allergies. This form will satisfy this requirement.

This form allows you to disclose whether your child has a food allergy or severe food allergy that you believe should be disclosed in order for ILTexas to take necessary precautions for your child’s safety. “Severe food allergy” means a dangerous or life-threatening reaction of the human body to a food-borne allergen introduced by inhalation, ingestion, or skin contact that requires immediate medical attention.

Please list any foods to which your child is allergic or severely allergic, as well as the nature of your child’s allergic reaction to the food. ILTexas will contact you for a note from your physician if your child has food allergies. Your child must have an EpiPen prescribed to help in the event of an emergency.

Food: \_\_\_\_\_ Nature of allergic reaction to the food: \_\_\_\_\_

ILTexas will maintain the confidentiality of this form and the information provided above, and may disclose the information to teachers, school counselors, school nurses, and other appropriate school personnel only within the limitations of the Family Educational Rights and Privacy Act (“FERPA”) and Board policy. ILTexas will maintain this form as part of your child’s student record.

Student Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
Grade: \_\_\_\_\_ Parent Work Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_ Parent/Guardian Name: \_\_\_\_\_  
\_\_\_\_\_  
Date: \_\_\_\_\_  
Parent/Guardian Signature: \_\_\_\_\_ Date form received by ILTexas: \_\_\_\_\_

[Explanation of General Education Homebound Instruction](#)

Dear Parents/Guardian:

Homebound services are educational services provided in the home or hospital for a student who is unable to attend school because of a documented health condition.

A student is eligible to be considered for general education homebound (“GEH”) services when the following conditions apply:

1. The student is expected to be confined at home or hospital bedside for a minimum of four weeks (need not be consecutive);
2. The student is confined at home or hospital bedside for medical reasons only; and
3. The student’s medical condition is documented by a physician licensed to practice in the United States.

When homebound services are no longer required, your child will be transitioned back to his or her previous educational setting.

Homebound services will allow a qualified teacher to come to your home to provide instruction to your child for 4–5 hours per week so that your child can remain current with required classwork and assignments. The homebound teacher will meet with your child’s classroom teacher(s) to ensure a coordinated educational program that will prepare your child for transition back into the campus setting. Attendance will be kept by the homebound teacher and reported to your child’s home campus.

Medical information is required from your child’s doctor before homebound services may be assigned. It is essential that you return this information as quickly as possible so services may begin promptly. Physician forms may be returned via parent, mail, or faxed to your student’s school. Homebound services cannot be initiated without this medical information.

During the time the process is taking place, please continue to get assignments from your child’s teacher(s). If more information is needed concerning GEH services, please contact your child’s campus.

Thank you,

---

GEH Campus Coordinator

**General Education Placement Homebound Placement**

The following form is to be utilized when the International Leadership of Texas Section 504 and/or GEH Committee is considering placement in general education homebound (“GEH”).

---

Date: \_\_\_\_\_

Student Name: \_\_\_\_\_ ID #: \_\_\_\_\_

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

Campus: \_\_\_\_\_

---

**Committee Membership**

While Section 504 eligibility is determined by a group of knowledgeable persons, including persons with knowledge of the child, the meaning of evaluation data, and the placement options, GEH eligibility and placement requires the attendance of three specific people: (1) a campus administrator; (2) a teacher of the student; and (3) a parent or guardian of the student. The required group may overlap to satisfy requirements under both Section 504 and GEH.

Participant Signatures	Relationship to student
	Administrator
	Teacher
	Parent

The most recent and all appropriate state assessment scores, benchmarks, report cards, progress reports, and any other appropriate documents should be attached to this form.

---

**Eligibility for GEH Services**

Pursuant to the Student Attendance Accounting Handbook (“SAAH”) and Board policy, the following must be answered to

determine GEH eligibility:

Yes \_\_\_\_\_ No \_\_\_\_\_ The committee has received, and attaches to this form, a document from a physician licensed to practice in the United States, which meets the following criteria:

1. Indicates that the above-referenced student is expected to be confined at home or hospital bedside for a minimum of four weeks. The weeks need not be consecutive.
2. Indicates that the confinement is for medical reasons only.

Yes \_\_\_\_\_ No \_\_\_\_\_ Based on the physician’s document, together with the committee’s review of current evaluation data (including parent input, teacher/administrator input, grade reports, work samples, results of standardized tests, etc.), the committee determines that the student is eligible for GEH services, and that such services shall be provided to the student as indicated below. The physician’s information is not the sole determining factor in the committee’s decision-making process.

Where both questions above are answered with “Yes,” the student is eligible for GEH services, and the committee shall determine the type(s) and amount of instruction to be provided. If either question is answered “No,” the student is not eligible for GEH services, but may be eligible for services under Section 504.

If the student is receiving special education services, please contact the counselor so an ARD meeting can be scheduled.

---

### GEH Services

GEH services will begin on \_\_\_\_\_ (date) and end on \_\_\_\_\_ (date).

GEH services will be delivered to (address): \_\_\_\_\_

---

GEH instruction will be provided by a qualified teacher, meaning a certified teacher when required by law and/or the International Leadership of Texas charter and/or a teacher having obtained NCLB “Highly Qualified” status. Over the course of the student’s confinement at home or hospital bedside, ***the student must be provided instruction in all core academic subject area courses in which the student is enrolled, and should be provided instruction in all other courses the student is enrolled in, if possible.*** The teacher providing GEH instruction will maintain a log of contact hours and other appropriate documentation related to the provision of these services.

The student will be provided instruction in the following subject areas (list all subject areas to be addressed by homebound instruction):

A rea of instruction: \_\_\_\_\_ Hours per week: \_\_\_\_\_

Teacher whose content will be taught: \_\_\_\_\_

A rea of instruction: \_\_\_\_\_ Hours per week: \_\_\_\_\_

Teacher whose content will be taught: \_\_\_\_\_



A rea of instruction: \_\_\_\_\_ Hours per week: \_\_\_\_\_

Teacher whose content will be taught: \_\_\_\_\_

A rea of instruction: \_\_\_\_\_ Hours per week: \_\_\_\_\_

Teacher whose content will be taught: \_\_\_\_\_

A rea of instruction: \_\_\_\_\_ Hours per week: \_\_\_\_\_

Teacher whose content will be taught: \_\_\_\_\_

A rea of instruction: \_\_\_\_\_ Hours per week: \_\_\_\_\_

Teacher whose content will be taught: \_\_\_\_\_

A rea of instruction: \_\_\_\_\_ Hours per week: \_\_\_\_\_

Teacher whose content will be taught: \_\_\_\_\_

A rea of instruction: \_\_\_\_\_ Hours per week: \_\_\_\_\_

Teacher whose content will be taught: \_\_\_\_\_

*Please note that the teacher whose content will be taught is responsible for assignments, testing, and grading.*

Students served through the GEH program will earn eligible days in attendance in accordance with the standards set forth in the SAAH.

---

### Optional Services

Check all optional services in addition to direct instruction that apply (if any):

\_\_\_\_\_ Access to textbooks, assignments, projects, and tests for self-study in the following subject areas:

---

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\_\_\_\_ Access to classroom teachers by phone in the following subject areas:

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\_\_\_\_ Extended time for completion of projects in the following subject areas:

---

---

\_\_\_\_ Access to educational software, distance learning, correspondence courses, or other online instruction. If yes, please detail services to be made available to the student.

---

---

\_\_\_\_ Other:

---

---

\_\_\_\_ Formal transition from GEH to the classroom. If the committee believes that a formal transition period is required for the student's return to school, please detail the transition calendar or steps for the transition.

---

---

---

**Homebound Services Statement to Parent/Guardian**

Student's Name: \_\_\_\_\_ Student ID #: \_\_\_\_\_

Campus: \_\_\_\_\_ Grade: \_\_\_\_\_ Age: \_\_\_\_\_

Days of Service: \_\_\_\_\_ Time: \_\_\_\_\_

Homebound Teacher: \_\_\_\_\_ Telephone: \_\_\_\_\_

Homebound instruction has been approved for my child. I agree to cooperate as follows:

- Provide a place in home that is quiet, free from distractions (away from other people and from TV), sanitary, well-lighted, and properly ventilated and heated.
- Ensure the student is prepared for instruction when the teacher arrives. Please arrange other activities, including doctor appointments, around scheduled instruction.
- Be aware that changes in the home schedule may be necessary.
- Ensure a responsible adult will always be in the home during instruction time. The homebound teacher will leave the home and the student will be counted absent if there is not an adult in the home.
- Notify the homebound teacher as soon as possible if the student is unable to receive instruction or if anyone in the home develops a contagious condition.
- The student must do 90% of the assigned work between the teacher’s visits. The student must be willing to work independently and accept the responsibility of homework with the guidance of the homebound teacher. The student should have uninterrupted study time.
- Parents and students must be aware that all tests, grades, and assignments come directly from the campus teachers.
- Household pets should not be allowed to interrupt home instruction. If pets are usually kept indoors, they should be confined to a room other than the one in which class is held.
- A student can be dismissed from the homebound program due to excessive unexcused absences. If scheduled instructional time is cancelled, absences will be reported.
- Homebound services cannot begin until the above conditions have been met, and homebound services may be discontinued if these conditions are not maintained.
- The student’s educational program will be planned and carried out on the basis of the limitations of the student and the homebound services program, which cannot provide the same experiences of regular classroom instruction.

I UNDERSTAND AND AGREE TO THE ABOVE RULES.

\_\_\_\_\_  
Parent Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

**Homebound Services Request for Medical Information**  
**Notice for Release/Consent to Request Confidential Information**

We are asking that you authorize the physician or agency named below to release specific records containing confidential

information regarding the above-named student.

**Requestor:** International Leadership of Texas  
1820 N. Glenville Dr. #100  
Richardson, TX 75081  
972-479-9078  
972-479-9129 (Fax #)

**Physician or agency to whom request is being made:** \_\_\_\_\_  
**Address:** \_\_\_\_\_  
**Phone:** \_\_\_\_\_ **Fax:** \_\_\_\_\_

**Information requested:** Medical information as related to homebound services

**Purpose of disclosure:**  
 **D**etermination of Educational Needs  
 **O**ther: \_\_\_\_\_

*Please check the appropriate box:*

**Y**es  **N**o I have been fully informed and understand that the International Leadership of Texas request for my consent for the release of medical information. I hereby authorize the above-named physician or agency to release the documents described above to International Leadership of Texas.

\_\_\_\_\_  
Student Signature \_\_\_\_\_ Date

\_\_\_\_\_  
Parent Signature (if student is a minor) \_\_\_\_\_ Date

Please return this form to Angela Marcellus, Executive Director of Student Services at the address and/or fax number listed above as soon as possible.

Physician's Verification of Need for Homebound Services

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

**Please be advised that the student will receive only up to four (4) hours of home instruction per week. Therefore, returning to his/her home campus at the earliest possible date is imperative for peer interaction and educational success.**

1. Date of Physical Exam: \_\_\_\_\_
2. Have you recommended a follow-up exam?  **Y**es  **N**o If yes, when? \_\_\_\_\_

3. Check one of the following statements:

The student will be confined to his/her home and/or hospital bedside for a minimum of four consecutive weeks except for visits to the doctor. The period of confinement is expected to last from \_\_\_\_\_ to \_\_\_\_\_

**OR**

The student is chronically ill and expected to be confined for a period of time totaling at least four weeks during the school year.

4. Describe the nature of the condition(s) resulting in the need for homebound services: \_\_\_\_\_  
\_\_\_\_\_

5. If the period of confinement is not expected to be continuous, describe the basis for your expectations that the student will be confined for a period of time totaling at least four weeks during the school year. Describe circumstances or conditions of the student that will necessitate confinement (e.g., daily chemotherapy for four weeks): \_\_\_\_\_  
\_\_\_\_\_

6. What are the criteria for the student returning to school? \_\_\_\_\_  
\_\_\_\_\_

7. Is the student confined to home?  Yes  No If not, is the student able to receive any instructional services on his/her campus (shortened school day, alternate school days, attend special events)?  Yes  No Explain: \_\_\_\_\_  
\_\_\_\_\_

8. Are there any accommodations that would enable the student to receive instruction on his/her campus: If yes, explain: \_\_\_\_\_  
\_\_\_\_\_

9. Is the student now physically able to perform school work with a homebound teacher?  Yes  No If not, please explain: \_\_\_\_\_  
\_\_\_\_\_

10. Is the nature of the condition:  physical  psychological/psychiatric  combination

11. Does the student have a communicable disease that poses a risk to the homebound teacher becoming infected or carrying it to another student?  Yes  No If yes, describe precautions that should be taken: \_\_\_\_\_  
\_\_\_\_\_

12. The period of time the student is expected to receive homebound services is approximately \_\_\_\_\_ weeks.

13. **Anticipated start date:** \_\_\_\_\_ **Anticipated end date:** \_\_\_\_\_

14. Additional comments to aid school staff in serving this student: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Based on my examination, this student (circle one) **has** / **does not have** a serious, acute illness, injury, or a long-term medical condition requiring homebound services.

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_

Physician's name (printed)

Physician's signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Physician's address  
Phone #

City,

State,

Zip

**Note:** *Homebound is intended to be a temporary school placement to provide instructional services when the student is unable to attend regular classes due to medical conditions. It is not an alternative placement for students who are habitually truant or simply refuse to attend school.*

**Physician's Statement – Homebound Services Release**

TO WHOM IT MAY CONCERN:

\_\_\_\_\_ (student's name) may return to the regular education program effective \_\_\_\_\_  
(date). \_\_\_\_\_

Comments:

\_\_\_\_\_

---

---

---

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---

---

Printed name of physician

Signature of physician

Date

**Homebound Services Homebound Work Assignment**

**This assignment is due by (date):** \_\_\_\_\_

**Instructions:**

---

---

---

---

---

---

*Please place in homebound box, and include any worksheets, maps, tests, videos, and/or study sheets.*

Thank you.

---

Classroom Teacher

*To be completed by homebound teacher:*

Date received: \_\_\_\_\_

Due date: \_\_\_\_\_

Date completed: \_\_\_\_\_

---

Homebound teacher signature

### Homebound Services Instructional Log

Student Name: \_\_\_\_\_ Student ID #: \_\_\_\_

Campus: \_\_\_\_\_ Grade: \_\_\_\_\_

Homebound Teacher: \_\_\_\_\_ Week of: \_\_\_\_\_

*A copy of this instruction log must be sent to the PEIMS clerk on a weekly basis.*

Weekly attendance is based on the following instructional hours the student is served:

Amount of Time Served per Week	Eligible Days Present Earned per Week
1 hour	1 day present
2 hours	2 days present



3 hours	3 days present
4 <b>or more</b> hours	4 days present (if the week is a 4-day week); 5 days present (if the week is a 5-day week)

Day	Date	Arrival Time	Departure Time	Instructional Time (in min.)	Teacher's initials	Student's initials	Notes/Other
Sun							
Mon							
Tue							
Wed							
Thur							
Fri							
Sat							

**Total Weekly Instructional Time:** \_\_\_\_\_

**Total Weekly Days in Attendance:** \_\_\_\_\_

\_\_\_\_\_  
Homebound Teacher Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Campus Administrator

\_\_\_\_\_  
Date

Homebound Services Time and Travel

Student Name: \_\_\_\_\_ Student ID #: \_\_\_\_

Campus: \_\_\_\_\_ Grade: \_\_\_\_\_

Homebound Teacher: \_\_\_\_\_ Week of: \_\_\_\_\_

*This sheet is to be completed and returned to the campus Admin Assistant or Budget Clerk.*

**TRAVEL TIME:**      *To Student Home*

*From Student Home*

Date	Depart Time	Arrival Time	Depart Time	Arrival Time	Total Travel Time

**Total Travel Time:** \_\_\_\_\_

**OTHER TIME** GEH meetings, teacher consults, etc.)

Date	Start Time	End Time	Total Other Time	Purpose

**Total Other Time:** \_\_\_\_\_

Homebound Teacher Signature: \_\_\_\_\_

Date: \_\_\_\_\_

*Office use only* Total instructional time (from log) + total travel time + total other time = Total time x /hour = total pay (\$)

Budget code: \_\_\_\_\_

**Homebound Services Teacher Notification**

Teacher: \_\_\_\_\_

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

Grade: \_\_\_\_\_

Date: \_\_\_\_\_

Dear Teacher:

The student named above has been placed in the Homebound Services Program. As of the date stated above, he/she will receive attendance credit according to the instructional hours the student is provided at home.. The attendance clerk will adjust attendance accordingly.

Since the student, in most cases, will be returning to your class when his/her condition allows, I will be asking you for weekly assignments and tests. Once completed, I will return these assignments and tests for your grading. Assignment sheets for the following week will be placed in your box. Please list assignments and tests in the space provided and return to the appropriate homebound box as soon as possible. **Prompt return of the assignments and graded work is greatly appreciated. THIS IS ESSENTIAL.**

It is impossible for homebound services to provide curriculum and materials for the numerous programs and subjects offered by International Leadership of Texas. Please provide all worksheets, manipulatives, and other materials needed to implement your lessons.

Homebound sessions will typically be scheduled for four hours per week, or as determined by the student’s ARD Committee and or GEH Committee, during which all academic areas are covered. Approximately 90% of all assignments have to be completed independently by the student. Any accommodations you can make to help the homebound student be successful in your class are greatly appreciated.

If you have any questions or concerns, I may be reached at \_\_\_\_\_.

Thank you for your assistance.

\_\_\_\_\_  
\_\_\_\_\_  
Homebound Teacher

**Homebound Services Attendance Notification**

**To: Campus Attendance Clerks**

**RE: Homebound Student**

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

Grade: \_\_\_\_\_

Start Date: \_\_\_\_\_

This student qualifies for Homebound Services. He/she will be marked absent by the classroom teacher. The classroom teachers absences will need to be modified in accordance with the SAAH. The table below outlines eligible days present earned per week.

<b>Amount of Time Served per Week</b>	<b>Eligible Days Present Earned per Week</b>
1 hour	1 day present
2 hours	2 days present
3 hours	3 days present
4 hours	4 days present (if the week is a 4-day week) 5 days present (if the week is a 5-day week)
More than 4 hours	4 days present (if the week is a 4-day week) 5 days present (if the week is a 5-day week)

The homebound teacher will submit weekly logs on Monday following a week of service. Please do NOT modify an absence without the instructional log.

Thank you,

\_\_\_\_\_  
Campus Homebound Coordinator

**Homebound Services Dismissal Notification**

**To: Campus Attendance Clerks and Teachers**

**RE: Homebound Student**

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

Grade: \_\_\_\_\_

Dismissal Date: \_\_\_\_\_

This student will be returning to school as of the dismissal date listed above. He/she will not longer be enrolled in the Homebound Services Program. As of the dismissal date, the classroom teacher should count the student absent if he/she does not attend class as regularly scheduled. You will be notified if the student should need homebound services again.

Thank you,

\_\_\_\_\_

\_\_\_\_\_  
Campus Homebound Coordinator

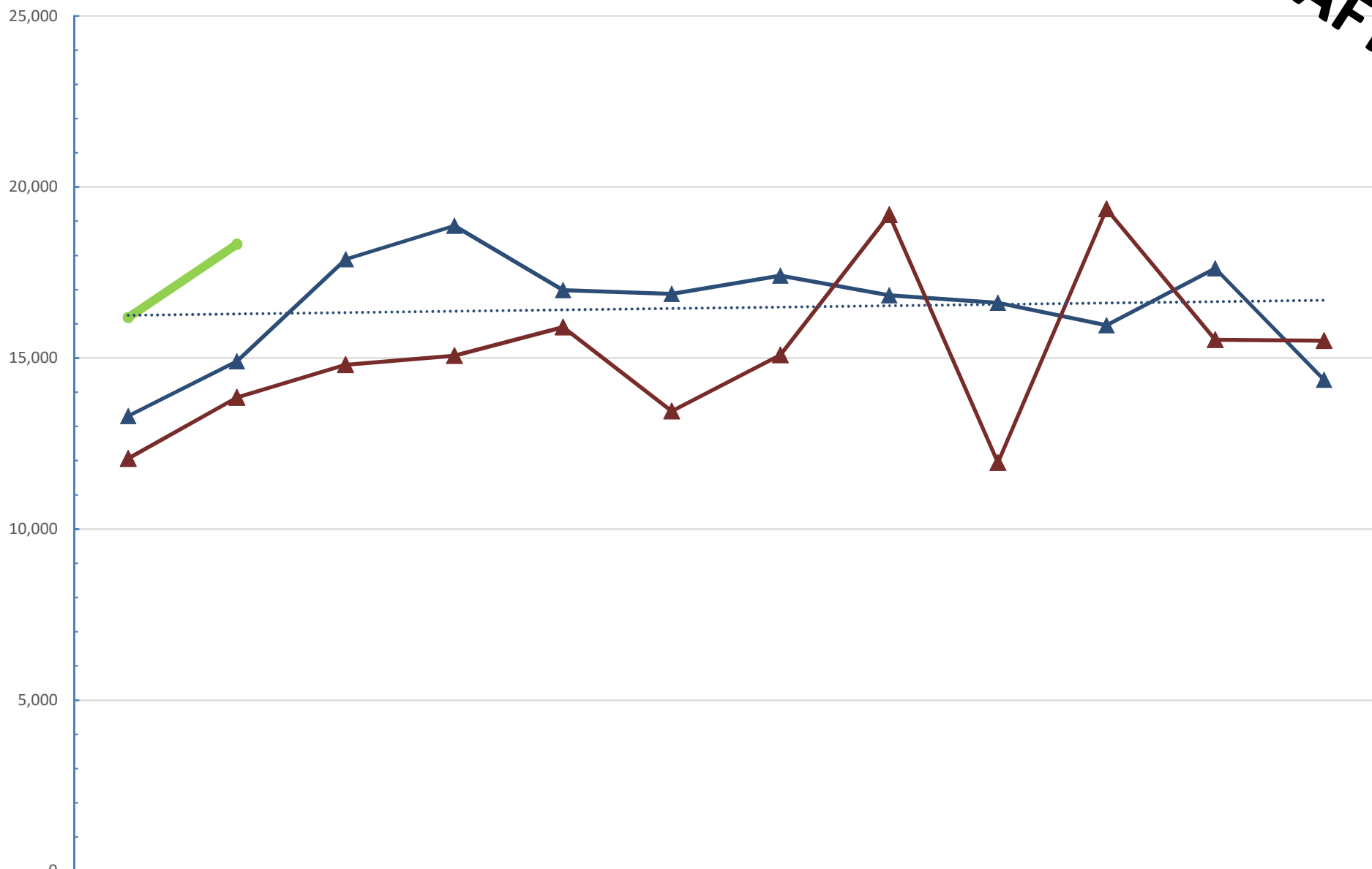
# Cover Sheet

## CONSIDER/ACT ON AUGUST, 2020 FINANCIAL REPORT

**Section:** VII. Other Board Items for Discussion/Action  
**Item:** A. CONSIDER/ACT ON AUGUST, 2020 FINANCIAL REPORT  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Board Financial Report 2020-08b.pdf

**DRAFT**

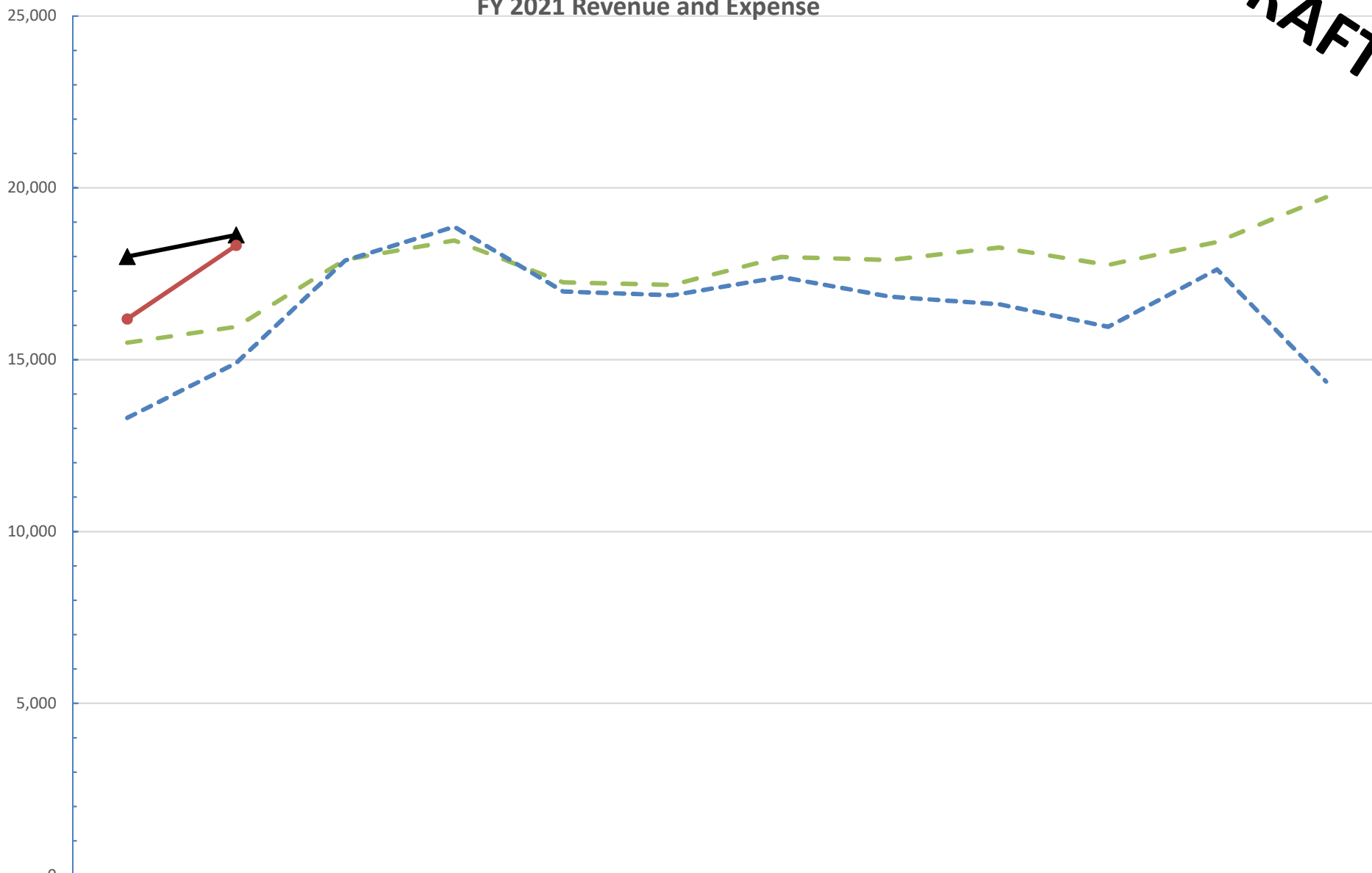
### TOTAL MONTHLY EXPENSES



	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE
2020-21	16,184,646	18,323,387										
2019-20	13,306,685	14,902,934	17,887,960	18,866,142	16,982,487	16,876,725	17,406,249	16,833,481	16,612,201	15,957,893	17,624,013	14,364,370
2018-19	12,064,266	13,846,414	14,803,071	15,066,973	15,906,248	13,443,654	15,087,697	19,185,321	11,941,085	19,356,312	15,535,001	15,506,318

**DRAFT**

### FY 2021 Revenue and Expense



	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE
<b>▲</b> FY21 Rev	17,998,181	18,626,957										
<b>●</b> 2020-21	16,184,646	18,323,387										
<b>- -</b> FY20 Rev	15,494,578	15,955,879	17,906,962	18,470,825	17,250,663	17,173,369	17,989,492	17,903,384	18,264,391	17,759,333	18,427,481	19,727,267
<b>- -</b> 2019-20	13,306,685	14,902,934	17,887,960	18,866,142	16,982,487	16,876,725	17,406,249	16,833,481	16,612,201	15,957,893	17,624,013	14,364,370



**DRAFT**

**ILTexas Board Report**

**Chief Financial Officer**

**August 31, 2020**

**Financial Integrity  
Rating System of Texas**

**2019-2020 Preliminary Rating = A-Superior (96 / 100 points)**  
**2020-2021 Rating Expected = A-Superior (95 / 100 points)**

**Pass / Fail**

- ✓ 1. Financial audit complete and submitted on time
- ✓ 2. Auditor found no material weakness in audit
- ✓ 3. District is in compliance with debt obligations
- ✓ 4. TRS payments were made on time
- ✓ 5. Total net assets were greater than \$-0-

**Financial Tests**

- ✓ 6. Net Assets > 75 days or not declined >25%/3yrs
- ✓ 7. 10 pts. Days cash on hand >100days (60 days = 10 pts.)
- ✓ 8. 10 pts. Cur. Assets/Cur. Liab. = 3.9x (≥ 2x = 10 pts.)
- ✓ 9. 5 pts. Earnings before depreciation > 0
- ✓ 10. 10 pts. Actual Revenue vs. TEA budget +/- 10%/3yrs
- ✓ 11. 10 pts. LT Liab. ≤60% Total Assets (growth exception)
- ✓ 12. 10 pts. Debt Service Coverage Ratio ≥ 1.2x
- ✗ 13. Unrestricted net assets <5% LT Liab. (5 pts. lost)
- ✓ 14. 10 pts. Administrative cost ratio ≤ 14.01%

**Operating Tests**

- ✓ 15. 10 pts. No enrollment decrease (Student : Staff Ratio)
- ✓ 16. 5 pts. Estimated ADA within 10% of estimate
- ✓ 17. Reported PEIMS data matched AFR data
- ✓ 18. Audit found no internal control weakness
- ✓ 19. 10 pts. No audit findings of Federal non-compliance
- ✓ 20. 5 pts. Required postings on website
- ✓ 21. Geographic Boundary test (max 89pts. if failed)

**Treasury / Accounting**

**BANKING**

• BBVA	31,403,000	1.000%
• BBVA mmkt	-0-	0.25%
• TexPool	62,000	0.35%

---

• Total Cash	\$ 31,465,000	(↑\$ 175,000)
• Less: Accel Pmts	-----	(↓\$ 885,000)
• Less: Revolver	-----	( no change )

---

**= Base-line Cash \$ 31,465,000** (↑\$ 710,000)

**Other Information**

BBVA Loans as of August 31:

- \$-0- million drawn on \$35 million line (3.15%)
- \$-0- million drawn on \$10 million line (4.00%)
- Paid-down July 7

Audit Complete – Seeking credit review

Key Indicators	Draft 2020	2021 Budget	YTD 2020
Revenue	\$ 213,875,000	\$ 217,140,816	\$ 36,625,000
Expenses	\$ 197,881,000	\$ 215,217,736	\$ 34,508,000
Net Income	\$ 16,434,000	\$ 1,923,080	\$ 2,117,000

**DRAFT**

# ILTexas Board Report

**Chief Financial Officer**

**July 31, 2020**

Key Indicators	2020 Est.	2021 Budget	July 2021
Revenue	\$ 212,323,000	\$ 217,140,816	\$ 17,680,000
Expenses	\$ 196,121,000	\$ 215,217,736	\$ 16,963,000
Net Income	\$ 16,202,000	\$ 1,923,080	\$ 717,000

## Financial Integrity Rating System of Texas

**2019-2020 Rating = A-Superior (96 / 100 points)**

### Pass / Fail

1. Financial audit completed and submitted on time
2. Auditor found no material weakness in audit.
3. District is in compliance with debt obligations
4. TRS payments were made on-time
5. Total net assets were greater than \$-0-

### Financial Tests

6. 6 pts. Days cash on hand  $\geq$  44 days (60 days = 10 pts.)
7. 10 pts. Current Assets  $\geq$  2x Current Liabilities
8. 10 pts. LT Liabilities  $\leq$  60% Total Assets (exception for growth)
9. 10 pts. Earnings before depreciation  $>$  0
10. 10 pts. Debt Service Coverage Ratio  $\geq$  1.2x
11. 10 pts. Administrative cost ratio  $\leq$  14.01%

### Operating Tests

12. 10 pts. No decrease in enrollment (Student: Staff Ratio)
13. 10 pts. Reported PEIMS data matched AFR data
14. 10 pts. No audit findings of Federal programs non-compliance
15. 10 pts. No over-allocation of TEA funds

## Treasury / Accounting

### BANKING

- BBVA 31,580,000 1.000%
- BBVA mmkt -0- 0.250%
- TexPool 60,000 0.350%

- 
- Total Cash \$ 31,640,000 (↓\$24,900,000)
  - Less: Accel Pmts 885,000 (↓\$ 2,700,000)
  - Less: Revolver - 0 - (↓\$25,000,000)

---

**= Base-line Cash \$ 30,755,000 (↑\$ 2,735,000)**

- YTD Fixed Assets purchases = \$ 650,000

## Other Information

BBVA Loans as of July 31:

- \$-0- million drawn on \$35 million line (3.15%)
- \$-0- million drawn on \$10 million line (4.00%)
- Paid-down July 7

# INTERNATIONAL LEADERSHIP OF TEXAS UNAUDITED

DRAFT

## FINANCIAL SUMMARY

	<small>HT</small> Jul-20	<small>HT</small> Aug-20	<small>HT</small> Sep-20	<small>HT</small> Oct-20	<small>HT</small> Nov-20	<small>HT</small> Dec-20	<small>HT</small> FY 2021
	2020-2021	2020-2021	2020-2021	2020-2021	2020-2021	2020-2021	2020-2021

Base Cash (excl. Excel. Pmt.)	\$	30,091,486	\$	31,175,433
Accelerated TEA Payment		885,000		-
<b>Total Ending Cash</b>	<b>\$</b>	<b>30,976,486</b>	<b>\$</b>	<b>31,175,433</b>
<i>Days Cash (excl. Bond Int. Fund)</i>		62.5		58.8

Bond Project Fund	38,393,859	38,393,859
-------------------	------------	------------

Lease & Notes Payable	\$	304,301	\$	304,301
\$10 million BBVA Revolver		-		-
\$35 million BBVA Revolver		-		-

<b>Revenues</b>	<b>\$</b>	<b>17,998,181</b>	<b>\$</b>	<b>18,626,957</b>		<b>\$</b>	<b>36,625,138</b>
<b>Less Expenses:</b>							
<b>Payroll Costs</b>		9,107,293		10,065,727			19,173,021
<b>Other Operating</b>		3,370,886		4,585,382			7,956,268
<b>Interest &amp; Amort.</b>		2,585,083		2,551,401			5,136,484
<b>Depreciation</b>		1,121,383		1,120,876			2,242,260
<b>Change in Net Assets</b>		<b>1,813,535</b>		<b>303,570</b>			<b>2,117,106</b>

<b>EBIDA</b>	<b>\$</b>	<b>5,520,002</b>	<b>\$</b>	<b>3,975,847</b>		<b>\$</b>	<b>9,495,849</b>
--------------	-----------	------------------	-----------	------------------	--	-----------	------------------

Total Liabilities	538,296,041	537,834,353
Total Equity	20,143,215	20,446,785
<b>D/E</b>	<b>26.7</b>	<b>26.3</b>
<b>Equity Percent</b>	<b>3.6%</b>	<b>3.7%</b>
<b>Interest &amp; Amort % of Revenue</b>	<b>14.4%</b>	<b>14.0%</b>

**CFO Target = 4:1**  
**CFO Target = 20%**  
**CFO Target < 8%**

**INTERNATIONAL LEADERSHIP OF TEXAS**  
**UNAUDITED**  
**Statement of Financial Position**

DRAFT

<b>Assets</b>	<b>Beginning</b>	<b>Jul-20</b>	<b>Aug-20</b>
<b>Current assets:</b>			
Cash and cash equivalents	\$ 57,332,076	\$ 30,315,360	\$ 30,505,974
Cash, bond project and maintenanc fund	652,792	661,126	669,459
Cash, bond debt service funds	17,473,186	17,473,186	17,473,186
Cash, debt service reserve fund	38,393,859	38,393,859	38,393,859
Due from government agencies	31,169,499	31,714,183	30,485,002
Other current assets	194,376	97,188	-
Total current assets	145,215,787	118,654,901	117,527,479
<b>Non-current assets:</b>			
Land	38,839,724	38,839,724	38,839,724
Buildings	429,746,529	429,746,529	429,746,529
Furniture and equipment	16,338,873	16,338,873	17,298,873
Vehicles	3,133,997	3,133,997	3,133,997
Less: Accumulated depreciation	(51,780,338)	(52,901,721)	(54,022,597)
Construction in Process	3,978,238	4,626,953	5,757,133
Total non-current assets	440,257,023	439,784,355	440,753,659
Total assets	\$ 585,472,811	\$ 558,439,256	\$ 558,281,138
<b>Liabilities and Net Assets</b>			
<b>Current Liabilities:</b>			
Accounts payable	4,054,289	3,371,871	4,370,320
Accrued payroll	14,014,968	14,015,142	13,991,662
Accrued interest	10,954,330	10,954,330	10,954,330
Student activity funds	748,529	725,535	764,645
Deferred revenue	3,741,587	1,041,587	156,587
Lease liabilities, current	146,446	146,446	146,446
Notes payable, current	-	-	-
Bonds, current maturities	5,805,455	5,805,455	5,805,455
Bonds, current payment fund	-	-	-
Total current liabilities	39,465,605	36,060,365	36,189,445
	3.7	3.3	3.2
<b>Long-term liabilities:</b>			
Lease liabilities, long-term	157,855	157,855	157,855
Notes payable, long-term	25,000,000	-	-
Bonds payable, long-term	514,768,197	514,284,409	513,651,705
Bonds payable, reserve and pmt funds	-	-	-
Bonds payable, premium net issue costs	(12,248,525)	(12,206,588)	(12,164,651)
Total long-term liabilities	527,677,527	502,235,676	501,644,908
Total liabilities	90.13% 567,143,131	538,296,041	537,834,353
<b>Net assts (deficit):</b>			
Beginning balance	16,829,679	18,328,764	18,328,764
Current year change in net assets	1,500,000	1,814,451	2,118,021
Total net assets	18,329,679	20,143,215	20,446,785
Total liabilities and net assets	\$ 585,472,811	\$ 558,439,256	\$ 558,281,138

**INTERNATIONAL LEADERSHIP OF TEXAS**  
**UNAUDITED**  
**Statement of Activities**

DRAFT

	<i>Average</i> FY2020	July 2020 FY 2021	Aug-20 FY 2021	Unaudited FY 2021
<i>Enrollment</i>				
Total Local Support	273,771	4,054	22,762	26,816
Total State Funds	15,664,642	15,226,140	18,591,516	33,817,656
Total Federal Program Rev.	1,762,087	2,767,987	12,680	2,780,667
<b>Total Revenues</b>	<b>\$ 17,700,500</b>	<b>\$ 17,998,181</b>	<b>\$ 18,626,957</b>	<b>\$ 36,625,138</b>
<b>Expenses</b>				
11 Instructional	7,669,925	7,386,326	8,716,877	16,103,203
12 Inst. resources & media	73,609	66,188	79,746	145,935
13 Curriculum & inst. staff devel.	553,167	544,302	609,847	1,154,149
21 Instructional leadership	110,069	126,074	118,107	244,180
23 School leadership	784,066	782,251	845,237	1,627,489
31 Guidance counseling & eval.	405,943	345,117	409,366	754,483
32 Social work services	7,388	5,814	5,662	11,476
33 Health services	119,158	175,521	161,729	337,250
34 Student transportation	106,351	83,618	104,926	188,543
35 Food services	837,983	715,101	658,221	1,373,322
36 Extracurricular activities	111,567	87,627	139,383	227,010
41 General administration	480,406	491,792	836,271	1,328,063
51 Facilities maintenance & ops.	2,084,172	2,175,365	2,312,062	4,487,427
52 Security and Monitoring	123,992	-	153,937	153,937
53 Data processing services	433,563	514,972	507,835	1,022,807
61 Community services	134,762	97,995	112,780	210,775
71 Debt service	2,325,114	2,586,583	2,551,401	5,137,984
71 Gain - Asset Recovery	(18,336)	-	-	-
81 Fundraising	530	-	-	-
<b>Total Expenses</b>	<b>\$ 16,343,428</b>	<b>\$ 16,184,646</b>	<b>\$ 18,323,387</b>	<b>\$ 34,508,032</b>
<b>Change in Total Net Assets</b>	<b>\$ 1,357,072</b>	<b>\$ 1,813,535</b>	<b>\$ 303,570</b>	<b>\$ 2,117,106</b>

**INTERNATIONAL LEADERSHIP OF TEXAS**  
**UNAUDITED**  
**Expenses by Object**

**DRAFT**

	<i>FY 2020</i>	<b>Jul-20</b>	<b>Aug-20</b>	<b>ILTexas</b>
	<i>AVERAGE</i>	FY 2021	FY 2021	2020-2021
6111 SALARY CONTROL	13	-	-	-
6112 SALARIES/WAGES SUB TEACH	129,036	-	10,338	10,338
6117 EXTRA DUTY/PROFESSIONAL	67,211	102,098	20,940	123,038
6118 STIPENDS/PROFESSIONAL	271,173	271,458	307,143	578,602
6119 SALARIES/WAGES TEACHERS/PROFE	5,896,162	6,177,877	7,279,491	13,457,368
6121 O/T SUPPORT PERSONNEL	47,627	14,360	85,302	99,662
6127 EXTRA DUTY PAY/SUPPORT PERSN	14,263	7,479	16,496	23,975
6129 SALARIES/WAGES SUP PERSNL	849,457	1,331,643	970,973	2,302,616
6139 EMPLOYEE ALLOWANCES	18,749	919	500	1,419
6141 FICA/MEDICARE	97,139	110,338	118,783	229,121
6142 GRP HLTH/LIFE INS	472,079	552,360	542,065	1,094,425
6143 WORKERS'COMP	26,869	201,200	276,388	477,588
6146 TRS	352,918	337,561	437,309	774,870
6149 EMPLOYEE BENEFITS	(83)	-	-	-
6179 PAYROLL ACCRUAL	<u>1,165,279</u>	<u>-</u>	<u>-</u>	<u>-</u>
<b>61-- Payroll Costs</b>	<b>9,407,892</b>	<b>9,107,293</b>	<b>10,065,727</b>	<b>19,173,021</b>

## INTERNATIONAL LEADERSHIP OF TEXAS

### UNAUDITED

### Expenses by Object

DRAFT

	FY 2020 AVERAGE	Jul-20 FY 2021	Aug-20 FY 2021	ILTexas 2020-2021
<b>61-- Payroll Costs</b>	<b>9,407,892</b>	<b>9,107,293</b>	<b>10,065,727</b>	<b>19,173,021</b>
6211 LEGAL SERVICES	29,219	20,828	47,262	68,091
6212 AUDIT SERVICES	5,234	30,000	30,000	60,000
6219 PROFESSIONAL SERVICES	-	-	-	-
6239 ESC SERVICES	30,640	3,015	106,895	109,910
6249 CONTRACTED MAINT/RPR	172,660	331,129	316,575	647,703
6254 INTERNET SERVICES	24,107	36,631	40,793	77,424
6255 CELL PHONES	6,000	6,363	6,274	12,637
6256 WATER/WASTE MGMNT	79,941	44,952	75,501	120,453
6257 PHONE	17,431	23,917	14,065	37,982
6258 ELECTRIC	114,281	96,903	116,861	213,764
6259 GAS	6,563	2,662	1,074	3,736
6269 RENTALS-OP LEASES	138,881	151,432	201,396	352,828
6297 SECURITY SERVICE/STUDENT	57,260	-	69,587	69,587
6299/2 Food Service Contracted Services	779,866	679,165	604,432	1,283,597
6299 MISC. CONTRACTED SERVICE	820,894	699,876	987,460	1,687,335
<b>62-- Professional and Contracted Svcs.</b>	<b>2,282,978</b>	<b>2,126,872</b>	<b>2,618,174</b>	<b>4,745,046</b>
6311 FUEL	9,978	2,922	63	2,985
6319 SUPPLIES M/O	61,258	56,195	163,979	220,174
6321 TEXTBOOKS	55,217	328,842	949,023	1,277,865
6329 READING MATERIALS	42,091	128,632	47,455	176,087
6339 TESTING MATERIALS	12,641	-	-	-
6398 DISCRETIONARY MATERIALS	50,000	60,000	60,000	120,000
6399 GENERAL SUPPLIES	553,330	373,128	371,491	744,619
6631 F&E / GRANT FUNDED	-	-	223,348	223,348
6639 F&E / GRANT FUNDED	6,599	-	-	-
6669 F&E / GRANT FUNDED	27,764	4,337	-	4,337
<b>63+66 Other Supplies &amp; Materials</b>	<b>818,878</b>	<b>954,056</b>	<b>1,815,358</b>	<b>2,769,414</b>
6411 EMPLOYEE TRAVEL	43,299	2,766	9,733	12,499
6412 TRAVEL-STUDENTS	4,131	-	-	-
6419 TRAVEL--NON-EMP	180	-	-	-
6429 INS/BONDING COSTS	113,880	187,167	86,993	274,160
6449 DEPR EXP	1,149,741	1,121,383	1,120,876	2,242,260
6494 RECLASS TRANSP EXP	(5,033)	-	-	-
6495 MEMBERSHIPS AND DUES	17,784	-	6,265	6,265
6499 MISC OP COSTS	202,921	98,525	48,859	147,384
<b>64-- Other Operating Expenses</b>	<b>1,526,903</b>	<b>1,409,841</b>	<b>1,272,726</b>	<b>2,682,567</b>
6521 INT ON BONDS	2,273,627	2,539,410	2,509,464	5,048,874
6522 CAPTL LEASE INT	(12,582)	-	-	-
6523 INT ON DEBT	12,268	3,736	-	3,736
6524 AMRT BOND ISSUE COSTS	41,937	41,937	41,937	83,874
6525 AMRT BOND PREM/DISC	-	-	-	-
6529 INTEREST CREDIT / BOND FUNDS	-	-	-	-
6599 OTHER DEBT FEES	9,863	1,500	-	1,500
7950 Gain - Asset Recovery	(18,336)	-	-	-
<b>Total Expenses</b>	<b>\$ 16,343,428</b>	<b>\$ 16,184,646</b>	<b>\$ 18,323,387</b>	<b>\$ 34,508,032</b>

# Cover Sheet

## CONSIDER/ACT TO ACCEPT AUDIT

**Section:** VII. Other Board Items for Discussion/Action  
**Item:** B. CONSIDER/ACT TO ACCEPT AUDIT  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** Audit Report - Final Draft.pdf



draft

**International American Education Federation, Inc.**

**Consolidated Financial Statements with Supplemental Information  
and Compliance Reports**

**June 30, 2020**

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**International American Education Federation, Inc.**  
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**International American Education Federation, Inc.**  
**Federal Employer Identification No. 27-4549127**  
**County District No. 057-848**  
**Certificate of Board**

We, the undersigned, certify that the attached Financial and Compliance Report of International American Education Federation, Inc. was reviewed and (check one) \_\_\_ approved \_\_\_ disapproved for the year ended June 30, 2020, at a meeting of the governing body of the charter holder on the \_\_\_th day of September, 2020.

\_\_\_\_\_  
Signature of Board Secretary

\_\_\_\_\_  
Signature of Board President

draft

## **Independent Auditors' Report**

To the Board of Directors of  
International American Education Federation, Inc.

### ***Report on Consolidated Financial Statements***

We have audited the accompanying consolidated financial statements of International American Education Federation, Inc. (a nonprofit Organization), which comprise the consolidated statement of financial position as of June 30, 2020, and the related consolidated statements of activities and cash flows for the year then ended, and the related notes to the consolidated financial statements.

### ***Management's Responsibility for the Financial Statements***

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with U.S. generally accepted accounting principles; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error.

### ***Auditors' Responsibility***

Our responsibility is to express an opinion on these consolidated financial statements based on our audit. We conducted our audit in accordance with U.S. generally accepted auditing standards and the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. The financial statements of International Leadership of Texas – Global were not audited in accordance with *Government Auditing Standards*. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free of material misstatement.

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the auditor's judgment, including the assessment of the risk of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the consolidated financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control.

International American Education Federation, Inc.

Page 2

Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the consolidated financial statements. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

### ***Opinion***

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the consolidated financial position of International American Education Federation, Inc. as of June 30, 2020 and the changes in its net assets and its cash flows for the year then ended in accordance with U.S. generally accepted accounting principles.

### ***Other Matters***

#### ***Supplementary Information***

Our audit was conducted for the purpose of forming an opinion on the consolidated financial statements as a whole. The supplementary information listed in the accompanying table of contents is presented for purposes of additional analysis and is not a required part of the consolidated financial statements. The accompanying schedule of expenditures of federal awards, as required by Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*, is presented for purposes of additional analysis and is also not a required part of the consolidated financial statements. The supplementary information is the responsibility of management and was derived from and relates directly to the underlying accounting and other records used to prepare the consolidated financial statements. The information has been subjected to the auditing procedures applied in the audit of the consolidated financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting records used to prepare the consolidated financial statements or to the consolidated financial statements themselves, and other additional procedures in accordance with U.S. generally accepted auditing standards. In our opinion, the information is fairly stated in all material respects in relation to the consolidated financial statements as a whole.

### ***Other Reporting Required by Government Auditing Standards***

In accordance with *Government Auditing Standards*, we have also issued our report dated September 16, 2020 on our consideration of International American Education Federation, Inc.'s internal control over financial reporting and on our tests of its compliance with certain provisions of laws, regulations, contracts, grant agreements and other matters. The purpose of that report is to describe the scope of our testing of internal control over financial reporting and compliance and the results of that testing, and not to provide an opinion on internal control over financial reporting or on compliance.

International American Education Federation, Inc.

Page 3

That report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering International American Education Federation, Inc.'s internal control over financial reporting and compliance.

A Limited Liability Partnership

Arlington, Texas  
September     , 2020

draft

**International American Education Federation, Inc.**  
**Consolidated Statement of Financial Position**  
**June 30, 2020**

**Assets**

**Current assets:**

Cash and cash equivalents	\$ 58,456,344
Restricted cash and cash equivalents	56,469,244
Due from government agencies	27,413,333
Accounts receivable	6,500
Other current assets	194,376

<b>Total current assets</b>	142,539,797
-----------------------------	-------------

Property and equipment, net	440,263,611
-----------------------------	-------------

<b>Total assets</b>	\$ 582,803,408
---------------------	----------------

**Liabilities and Net Assets**

**Current liabilities:**

Accounts payable	\$ 1,059,571
Accrued payroll	14,014,967
Accrued interest	13,365,876
Student activity funds	763,207
Deferred revenue	564,486
Other liability	649,062
Current maturities of finance lease liability	146,446
Current maturities of long-term debt	5,831,373

<b>Total current liabilities</b>	36,394,988
----------------------------------	------------

**Long-term liabilities:**

Finance lease liability	157,855
Long-term debt, net of debt issuance costs	527,561,232

<b>Total liabilities</b>	564,114,075
--------------------------	-------------

**Net assets:**

Without donor restrictions	2,396,423
With donor restrictions	16,292,910

<b>Total net assets</b>	18,689,333
-------------------------	------------

<b>Total liabilities and net assets</b>	\$ 582,803,408
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See notes to consolidated financial statements.



**International American Education Federation, Inc.**  
**Consolidated Statement of Activities**  
**Year Ended June 30, 2020**

	Without donor restrictions	With donor restrictions	Total
<b>Revenue and support:</b>			
<b>Local support:</b>			
SSA - Local revenues from member districts	\$ 2,131,394	\$ -	\$ 2,131,394
Interest, dividends, gains, and losses	629,581	-	629,581
Foundations, other non-profit organizations, gifts, and bequests	109,648	-	109,648
Other revenues from local sources	867,223	-	867,223
Food service activity	1,103,931	-	1,103,931
<b>Total local support</b>	<b>4,841,777</b>	<b>-</b>	<b>4,841,777</b>
<b>State program revenues:</b>			
Per capita apportionment	-	5,640,996	5,640,996
Foundation school program act revenue	-	180,681,158	180,681,158
State program revenue distributed by TEA	-	1,653,550	1,653,550
<b>Total state program revenues</b>	<b>-</b>	<b>187,975,704</b>	<b>187,975,704</b>
<b>Federal program revenue:</b>			
National school breakfast and lunch program	-	7,733,983	7,733,983
Federal program revenue distributed by TEA	-	6,251,270	6,251,270
Federal revenues distributed by other State of Texas agencies	-	6,906,250	6,906,250
<b>Total federal program revenue</b>	<b>-</b>	<b>20,891,503</b>	<b>20,891,503</b>
Net assets released from restrictions-			
Restrictions satisfied by payments	196,341,174	(196,341,174)	-
<b>Total revenue and support</b>	<b>201,182,951</b>	<b>12,526,033</b>	<b>213,708,984</b>

draft

See notes to consolidated financial statements.

**International American Education Federation, Inc.**  
**Consolidated Statement of Activities**  
**Year Ended June 30, 2020**

	Without donor restrictions	With donor restrictions	Total
<b>Expenses:</b>			
Instruction	\$ 92,334,474	\$ -	\$ 92,334,474
Instruction resources and media	883,303	-	883,303
Curriculum and instructional staff development	6,638,021	-	6,638,021
Instructional leadership	1,320,821	-	1,320,821
School leadership	9,408,778	-	9,408,778
Guidance, counseling and evaluation services	4,871,333	-	4,871,333
Social work services	88,658	-	88,658
Health services	1,429,905	-	1,429,905
Student transportation	1,229,552	-	1,229,552
Food services	10,102,452	-	10,102,452
Extracurricular activities	1,338,815	-	1,338,815
General administration	6,794,713	-	6,794,713
Facilities maintenance and operations	25,010,072	-	25,010,072
Security and monitoring services	1,487,898	-	1,487,898
Data processing services	5,202,734	-	5,202,734
Community services	1,617,074	-	1,617,074
Debt service	27,901,366	-	27,901,366
Fundraising	6,360	-	6,360
<b>Total expenses</b>	<u>197,666,329</u>	<u>-</u>	<u>197,666,329</u>
<b>Excess of revenues over expenses from operations</b>	3,516,622	12,526,033	16,042,655
<b>Non-operating activities:</b>			
Other gain	220,033	-	220,033
<b>Total non-operating activities</b>	<u>220,033</u>	<u>-</u>	<u>220,033</u>
<b>Change in net assets</b>	3,736,655	12,526,033	16,262,688
<b>Net assets at beginning of year</b>	<u>(1,340,232)</u>	<u>3,766,877</u>	<u>2,426,645</u>
<b>Net assets at end year</b>	<u>\$ 2,396,423</u>	<u>\$ 16,292,910</u>	<u>\$ 18,689,333</u>

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See notes to consolidated financial statements.

**International American Education Federation, Inc.**  
**Consolidated Statement of Cash Flows**  
**Year Ended June 30, 2020**

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<b>Cash flows from operating activities:</b>	
Change in net assets	\$ 16,262,688
Adjustments to reconcile change in net assets to net cash provided by operating activities	
Depreciation	13,800,184
Amortization of bond discount	(361,708)
Amortization of debt issuance costs	448,335
Changes in assets and liabilities:	
Due from government agencies	124,639
Accounts receivable	97,028
Other receivable	116,779
Other current assets	52,653
Accounts payable	(1,304,066)
Accrued payroll	1,325,253
Accrued interest	472,993
Student activity funds	(32,453)
Deferred revenue	(698,394)
Other liability	649,062
Net cash provided by operating activities	30,952,993
<b>Cash flows from investing activities:</b>	
Proceeds from sale of investments	16,098,557
Purchases of property and equipment	(4,743,402)
Net cash provided by investing activities	11,355,155
<b>Cash flows from financing activities:</b>	
Net proceeds from issuance of long-term debt	25,067,478
Principal payments on finance lease liabilities	(3,246,290)
Principal payments on long-term debt	(7,194,614)
Net cash provided by financing activities	14,626,574
Net increase in cash and restricted cash and cash equivalents	56,934,722
<b>Cash and restricted cash and cash equivalents at beginning of year</b>	<b>57,990,866</b>
<b>Cash and restricted cash and cash equivalents at end of year</b>	<b>\$ 114,925,588</b>
<b>Reconciliation of cash and restricted cash and cash equivalents reported within the statement of financial position to the statement of cash flows:</b>	
Cash and cash equivalents	\$ 58,456,344
Restricted cash and cash equivalents	56,469,244
<b>Cash and restricted cash and cash equivalents reported on the statement of cash flows</b>	<b>\$ 114,925,588</b>
<b>Supplemental disclosure of cash flow information:</b>	
Cash paid for interest	\$ 30,566,314
<b>Supplemental schedule of noncash investing and financing activities:</b>	
Property and equipment acquired through finance lease	\$ 358,920

See notes to consolidated financial statements.

# International American Education Federation, Inc.

## Notes to Consolidated Financial Statements

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### 1. School and Nature of Activities

International American Education Federation, Inc. (Corporation), is a Texas not-for-profit corporation formed in 2011 and exempt from federal income taxes pursuant to Section 501(c)(3) of the Internal Revenue Code. The Corporation is governed by a Board of Directors comprised of five members. The Board of Directors is selected pursuant to the bylaws of the Corporation and has the authority to make decisions, appoint the chief executive officer of the Corporation, and significantly influence operations. The Board of Directors has the primary accountability for the fiscal affairs of the Corporation. The Corporation operates a single charter school, International Leadership of Texas (ILTexas) and conducts other non-charter activities with and through International Leadership of Texas – Global, a separate not-for-profit corporation.

ILTexas is a state authorized, open enrollment charter school incorporating leadership and culture into all student classrooms. Students are given leadership roles teaching the concept of others before self. Each year, students put their dedication into action in a community service project and spend time learning 12 important character traits that foster a good leader. These traits empower students to overcome challenges to create a better, and more productive society in which to live and work. Stated directly, the mission of ILTexas is to prepare students for exceptional leadership roles in the international community by emphasizing servant leadership, mastering the English, Spanish, and Chinese languages, and strengthening the mind, body and character. In 2018, the Texas Education Agency approved the ILTexas charter renewal through 2028.

In 2013, its first year of operations, ILTexas opened its doors to over 2400 students. This rapid growth has continued and, for the school year ended June 2020, ILTexas served over 19,100 students at 32 campuses among 19 locations. Now, at the opening of the 2020-2021 school year, ILTexas currently serves over 21,000 enrolled students.

International Leadership of Texas - Global (ILT Global) is a Texas not-for-profit corporation formed in 2014 and exempt from federal income taxes pursuant to Section 501(c)(3) of the Internal Revenue Code with a mission to strengthen, enhance and support the advancement of ILTexas by engaging in fundraising and other charitable activities. ILT Global also operates a private school to serve ninth through twelfth grades with a primary focus of offering a Chinese cultural exchange program for the benefit of students in Texas and China. ILT Global partners with the Corporation's open-enrollment charter school to further support and facilitate cross-cultural educational models and methods.

ILT Global is included in these consolidated financial statements since the Corporation has a direct controlling interest and receives economic benefit from ILT Global. Intercompany transactions and balances are eliminated in the consolidation process. Unless otherwise noted, these consolidated entities are hereinafter referred to as the School. IL Texas receives support from the State of Texas Foundation School Fund, government grants and contributions. ILT Global is funded through tuition revenue, fees and donations.

# International American Education Federation, Inc.

## Notes to Consolidated Financial Statements

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### 2. Summary of Significant Accounting Policies

#### ***Basis of Accounting and Consolidated Financial Statement Presentation***

The School prepares its consolidated financial statements on the accrual basis of accounting in accordance with U.S. generally accepted accounting principles (GAAP).

Net assets and revenues, expenses, gains and losses are classified based on the existence and nature or absence of donor-imposed restrictions. Accordingly, net assets and changes therein are classified as follows:

*Net assets without donor restrictions* - Net assets not subject to donor or grantor imposed restrictions. Net assets without donor restrictions may be designated for specific purposes by action of the board of directors. Where applicable, net assets without donor restrictions remain subject to state accountability.

*Net assets with donor restrictions* - Net assets subject to donor or grantor restrictions that will be met by actions of the School and/or the passage of time. When a restriction expires, net assets with donor restrictions are reclassified to net assets without donor restrictions and reported in the consolidated statement of activities as net assets released from restrictions.

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#### ***Credit and Market Risk Concentrations***

Financial instruments which are potentially subject to concentrations of credit risk consist of cash and cash equivalents and accounts receivable. Cash and cash equivalents are placed with high credit quality financial institutions to minimize risk. The balances are insured by the Federal Deposit Insurance Corporation (FDIC) up to \$250,000. At June 30, 2020 the School had no bank balances that were uninsured or without pledged collateral in the School's name.

During the year ended June 30, 2020, the School earned revenues of \$201,960,957 from the Texas Education Agency (TEA). These amounts constitute approximately 95% of total revenues earned. Any unforeseen loss of the charter agreement with TEA or changes in legislative funding could have a material effect on the ability of the School to continue to provide the current level of educational services to its students.

#### ***Cash and Cash Equivalents***

The School considers all highly liquid investments with original maturities of three months or less to be cash equivalents.

## **International American Education Federation, Inc.**

### **Notes to Consolidated Financial Statements**

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#### ***Property and Equipment***

Property and equipment are stated at cost, if purchased, and at fair market value, if donated. Assets with a cost of \$5,000 or more and an expected life greater than one year are capitalized.

Property and equipment acquired with public funds received for the operation of the School constitute public property pursuant to Chapter 12 of the Texas Education Code. Depreciation of these assets is calculated on a straight-line method over the estimated useful lives of 3 to 40 years. Expenditures for additions, major renewals, and betterments are capitalized, and maintenance and repairs are charged to expense as incurred.

#### ***Impairment of Long Lived Assets***

The School reviews the carrying value of long-lived assets to determine if facts and circumstances suggest that they may be impaired. In cases where undiscounted expected future cash flows are less than the carrying value, an impairment loss is recognized equal to an amount by which the carrying value exceeds the fair value of assets. There were no indications of asset impairment during the year ended June 30, 2020.

#### ***Debt Issuance Costs and Original Issue Discounts***

Debt issuance costs and original issue discounts represent costs incurred related to the issuance of bonds payable and are deferred as a direct deduction from the carrying amount of bonds payable and amortized using the interest method over the related bond period. Amortization expense is included in debt service in the accompanying consolidated statement of activities.

#### ***Revenue Recognition***

Revenues from the state of Texas are earned based on reported attendance. Public and private grants received are recognized in the period received and when the terms of the grant are met. If public and private terms are not met revenues are reimbursed to funder. Conditional promises to give are contingent upon the School meeting certain criteria specified by the donors. Revenues from conditional promises to give are not recognized until the condition has been fulfilled, advances received from donors are recorded as deferred revenues until the condition has been fulfilled.

A portion of the School's revenue is derived from cost-reimbursable contracts and grants, which are conditioned upon certain performance requirements and/or the incurrence of allowable qualifying expenses. Amounts are recognized as revenue when the School has incurred expenditures in compliance with specific contract or grant provisions. Amounts received prior to incurring qualifying expenditures are reported as refundable advances in the consolidated statement of financial position. The School was awarded cost-reimbursable grants of \$6,673,059 that have not been received or recognized at June 30, 2020 because qualifying expenditures have not yet been incurred.

## International American Education Federation, Inc.

### Notes to Consolidated Financial Statements

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The School recognizes contribution revenue for certain services received at the fair value of those services, provided those services create or enhance non-financial assets or require specialized skills which are provided by individuals possessing those skills and would typically need to be purchased if not provided by donation. Numerous individuals donate significant amounts of time to the School. No donated services were utilized that met the criteria to be recorded as revenue in the School's financial statements.

Tuition revenue is recognized over the period ILT Global provides services to students. Revenue is reported at the expected transaction price for customers based on historical experience and current market conditions. The estimate of the transaction price is determined by reducing the standard charge by any contractual adjustments, discounts and implicit price concessions based on historical collection experience.

Revenue is recognized as performance obligations are satisfied, which is primarily ratably over the academic year. Generally, ILT Global bills students prior to the beginning of the academic year and student accounts receivable are due in full before classes begin unless the student has entered into a monthly payment plan. If a student withdraws during the academic year, the student is refunded based on a defined refund schedule. At year-end, there is no refund liability as the academic year is substantially complete. Accounts receivable are stated at the amount of consideration from students, of which the ILT Global has an unconditional right to receive. Balances are comprised of individually insignificant uncollateralized amounts from students and generally require payment either annually, semi-annually or monthly during the fiscal year. Accounts receivable balances older than sixty days are considered delinquent triggering collection efforts. Deferred tuition and fees consist of tuition and other fees collected in advance and are recognized as revenue over the school year.

#### **Leases**

The School accounts for two distinct types of leases, finance and operating which (i) requires lessees to record a right-of-use asset and a related liability for the rights and obligations associated with a lease, regardless of lease classification, and recognize lease expense in a manner similar to current accounting, (ii) eliminates current real estate specific lease provisions, (iii) modifies the lease classification criteria and (iv) aligns many of the underlying lessor model principles with those in the new revenue standard.

The right-of-use asset is subsequently depreciated using the straight-line method from the commencement date to the earlier of the end of the useful life of the right-of-use asset or the end of the lease term. The estimated useful lives of the right-of-use asset is periodically reduced by impairment losses, if any, and adjusted for certain premeasurements for the lease liability.

The lease liability is initially measured at the present value of the lease payments that are not paid at the commencement date, discounted using the interest rate implicit in the lease or, if that rate cannot be readily determined, the School's incremental borrowing rate. Generally, the School uses its incremental borrowing rate as a discount rate.

## International American Education Federation, Inc.

### Notes to Consolidated Financial Statements

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Lease payments included in the measurement of the lease liability comprise the following:

- Fixed payments, including in-substance fixed payments;
- Variable lease payments that depend on an index or a rate, initially measured using the index or rate as the commencement date;
- Amounts expected to be payable under a residual value guarantee; and
- The exercise price under the purchase option that the School is reasonably certain to exercise, lease payments in an optional renewal period if the School is reasonably certain to exercise an extension option, and penalties for early termination of a lease unless the School is reasonably certain not to early terminate.

The lease liability is measured at amortized cost using the effective interest method. It is remeasured when there is a change in future lease payments arising from a change in an index or rate, if there is a change in the School's estimate of the amount expected to be payable under a residual value guarantee, or if the School changes its assessment of whether it will exercise a purchase, extension or termination option.

The School has elected not to recognize right-of-use assets and lease liabilities for short term leases of furniture and equipment that have a lease term of 12 months or less and leases of low-value assets. The School recognizes the lease payments associated with these leases as an expense on a straight-line basis over the lease term.

#### ***Federal Income Taxes***

ILTexas and ILT Global are organized as Texas nonprofit corporations and have been recognized by the Internal Revenue Service (IRS) as exempt from federal income taxes under Section 501(c)(3) of the Internal Revenue Code. Each entity is annually required to file a Return of Organization Exempt from Income Tax (Form 990) with the IRS. In addition, the entities are subject to income tax on net income that is derived from business activities that are unrelated to their exempt purposes. For the year ended June 30, 2020, the entities did not conduct unrelated business activities that would be subject to federal income taxes and had no uncertain tax positions. Therefore, no tax provision or liability has been reported in the accompanying consolidated financial statements.

GAAP requires the evaluation of tax positions taken in the course of preparing each entity's annual Form 990 and recognition of a tax liability (or asset) if the entity has taken an uncertain position that more likely than not would not be sustained upon examination by the IRS. Management has analyzed the tax positions taken by each entity, and has concluded that as of June 30, 2020, there are no uncertain tax positions taken or expected to be taken that would require recognition of a liability (or asset) or disclosure in the consolidated financial statements.



## International American Education Federation, Inc.

### Notes to Consolidated Financial Statements

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#### ***Estimates and Assumptions***

The preparation of financial statements in conformity with GAAP requires management to make estimates and assumptions that affect the reported amounts of assets and liabilities and disclosure of contingent assets and liabilities at the date of the financial statements and the reported amounts of revenues and expenses during the reporting period. Actual results could differ from those estimates.

#### ***Contract Compliance***

The School is responsible for compliance with provisions of contracts and grant agreements. Noncompliance could result in the disallowance of expenditures and a request for reimbursement. In the opinion of the School's management, such disallowance, if any, would not be significant to the School's consolidated financial statements.

#### ***Personal Leave***

All employees of the School earn five days of state personal and sick leave per year and three days of local personal sick leave per year. There is no material liability for unpaid accumulated sick leave since the schools do not have a policy to pay any amount when the employees separate from service with the schools, and any unused balance of state days is transferable to other schools. The local days, if not used, are forfeited at the end of each year.

#### ***Accounting Pronouncements Adopted***

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The School adopted Accounting Standards Update (ASU) 2014-09, *Revenue from Contracts with Customers (Topic 606)* effective July 1, 2019, using the full retrospective method. Based on the School's review of its contracts with students, the timing and amount of revenue recognized previously is consistent with how revenue is recognized under this new standard.

In conjunction with the adoption of ASU 2014-09, the School adopted the amendments of ASU 2018-08, *Not-for-Profit Entities (Topic 958): Clarifying the Scope and the Accounting Guidance for Contributions Received and Contributions Made*, effective July 1, 2019, using the full retrospective method. The amendments in this ASU clarify and improve current guidance about whether a transfer of assets (or the reduction, settlement, or cancellation of liabilities) is a contribution or exchange transaction and provide additional guidance on determining whether a contribution is conditional or unconditional.

Adoption of these ASUs had no impact on total beginning net assets, but resulted in additional disclosures and changes in presentation.

## International American Education Federation, Inc.

### Notes to Consolidated Financial Statements

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### 3. Restricted Cash and Cash Equivalents

Certain cash and cash equivalents are held in trust, which includes amounts required to be maintained in separate bank accounts in accordance with the 2015 and 2018 Series Master Trust Indenture and Security Agreements. Cash and cash equivalents held in trust and interest income earned on these funds are limited as to use under the terms of the bond indenture.

Restricted cash and cash equivalents held in trust were restricted as follows at June 30, 2020:

Debt service reserve fund	\$ 38,393,858
Bond debt service fund (interest)	10,489,349
Bond debt service fund (principal)	6,815,740
Bond project and maintenance fund	652,792
Classroom consortium (ILT Global)	<u>117,505</u>
<b>Total restricted cash and cash equivalents</b>	<b><u><u>\$ 56,469,244</u></u></b>

### 4. Property and Equipment

Property and equipment consist of the following as of June 30, 2020:

Land	38,839,724
Buildings and improvements	429,746,529
Furniture and equipment	16,348,751
Vehicles	3,133,998
Construction in progress	<u>3,978,239</u>
<b>Total property and equipment</b>	<b>492,047,241</b>
Less accumulated depreciation	<u>(51,783,630)</u>
<b>Property and equipment, net</b>	<b><u><u>\$ 440,263,611</u></u></b>

Depreciation expense for the year ended June 30, 2020 totaled \$13,800,184.

### 5. Deferred Revenue

Deferred revenue consists of the following as of June 30, 2020:

Refundable advance	\$ 156,587
Deferred tuition and related fees	<u>407,899</u>
	<b><u><u>\$ 564,486</u></u></b>

## International American Education Federation, Inc. Notes to Consolidated Financial Statements

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### ***Tuition and Related Fee Revenue***

The following table provides information about significant changes in tuition and related fees paid in advance as of June 30, 2020:

Tuition and related fees paid in advance, beginning of year	\$ 1,262,880
Revenue recognized that was included in deferred tuition and related fees at the beginning of the year	(1,262,880)
Increase in tuition and related fees due to cash received during the year	<u>407,899</u>
Tuition and related fees paid in advance, end of year	<u><u>\$ 407,899</u></u>

## **6. Leases**

### ***Finance Leases***

The School leases furniture and equipment totaling \$334,044 under finance leases at June 30, 2020. Accumulated depreciation on these assets totaled \$74,232 at June 30, 2020.

As of June 30, 2020 the School has a finance lease liability totaling \$304,301 bearing interest at the incremental borrowing rate of 4.625%.

The future expected payments for the years ending June 30 are as follows:

2021	\$ 160,317
2022	123,160
2023	39,880
Less amounts representing interest	<u>(19,056)</u>
Present value of future minimum lease payments	304,301
Less current maturities	<u>146,446</u>
Finance lease liability, net of current maturities	<u><u>\$ 157,855</u></u>

The majority of the leases contain purchase options exercisable by the School. The School intends to exercise these purchase options. The School assesses at lease commencement whether it is reasonably certain to exercise its purchase options. The School reassesses whether it is reasonably certain to exercise the options if there is a significant event or significant change in circumstances within its control.

## International American Education Federation, Inc. Notes to Consolidated Financial Statements

### 7. Long-Term Debt

The following is a summary of changes in the School’s total long-term debt for the year ended June 30, 2020.

	Beginning Balances	Additions	Reductions	Ending Balances	Amounts Due Within One Year
<b>Bonds payable:</b>					
Series 2015A	\$ 105,680,000	\$ -	\$ -	\$ 105,680,000	\$ 410,000
Series 2015B	3,550,000	-	(1,920,000)	1,630,000	1,630,000
Series 2018A	53,580,000	-	-	53,580,000	-
Series 2018B	1,570,000	-	(345,000)	1,225,000	465,000
Series 2018C	1,615,213	-	(231,561)	1,383,652	245,455
Series 2018D	344,220,000	-	-	344,220,000	-
Series 2018E	12,855,000	-	-	12,855,000	3,055,000
Bond discounts	(4,482,003)	(361,708)	-	(4,843,711)	-
Debt issuance costs	(7,853,149)	-	448,335	(7,404,814)	-
<b>Total bonds payable</b>	<b>510,735,061</b>	<b>(361,708)</b>	<b>(2,048,226)</b>	<b>508,325,127</b>	<b>5,805,455</b>
Notes payable	4,698,053	67,478	(4,698,053)	67,478	25,918
Lines of credit	-	25,000,000	-	25,000,000	-
<b>Total</b>	<b>\$ 515,433,114</b>	<b>\$ 24,705,770</b>	<b>\$ (6,746,279)</b>	<b>\$ 533,392,605</b>	<b>\$ 5,831,373</b>

On June 1, 2015 the School issued \$105,680,000 Education Revenue Bonds – Series 2015A and \$5,360,000 of taxable Education Revenue Bonds – Series 2015B. The bonds mature serially each August 5, starting 2018 until 2045. The bonds were issued as education revenue bonds, and have interest rates ranging from 4.625% to 6%, and are collateralized by a deed of trust and pledge of revenues of the School.

On September 15, 2018 the School issued \$53,580,000 Education Revenue Bonds – Series 2018A, \$1,570,000 of Taxable Education Revenue Bonds – Series 2018B, \$1,615,213 Subordinate Education Revenue Bonds – Series 2018C. The bonds mature serially each March 1, starting 2019 until 2043. The bonds were issued as education revenue bonds, and have interest rates ranging from 6% to 8.5%, and are collateralized by a deed of trust and pledge of revenues of the School.

On December 20, 2018 the School issued \$344,220,000 Education Revenue Bonds – Series 2018D and \$12,855,000 of Taxable Education Revenue Bonds – Series 2018E. The bonds mature serially each August 15, starting 2020 until 2048. The bonds were issued as education revenue bonds, and have interest rates ranging from 5% to 6.125%, and are collateralized by a deed of trust and pledge of revenues of the School.

## International American Education Federation, Inc. Notes to Consolidated Financial Statements

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Proceeds of the bonds were used for capital asset purchases, construction, repayment of previously issued debt and establishing reserves for future debt service. The bonds are secured by notes issued under the master trust indenture, and such notes are secured by real estate.

The master trust indenture establishes that the School must maintain operating reserves in an amount equal to at least forty five days of actual expenses for the year ended June 30, 2020 as well as a debt service coverage ratio, which stipulates that available revenues for each fiscal year must be equal to at least 1.10 times the annual debt service of the School as of the end of the first fiscal year after the date of issuance and thereafter until the individual bond or notes have been paid in full. During the year ended June 30, 2020, the School was in compliance with the requirements in accordance with the master trust indenture. The required debt service payments to satisfy the requirements of the bonds are as follows for the years ending June 30:

	Principal	Interest	Total
2021	\$ 5,805,455	\$ 29,586,138	\$ 35,391,593
2022	8,295,182	29,237,593	37,532,775
2023	8,865,793	28,785,475	37,651,268
2024	9,352,341	28,300,102	37,652,443
2025	9,849,881	27,797,987	37,647,868
2026-2030	102,235,000	128,162,400	230,397,400
2031-2035	66,720,000	100,699,476	167,419,476
2036-2040	89,105,000	79,311,075	168,416,075
2041-2045	120,020,000	50,372,300	170,392,300
2046-2049	100,325,000	14,182,950	114,507,950
Total	\$ 520,573,652	\$ 516,435,496	\$ 1,037,009,148

As of June 30, 2019 the School had various notes payable with financial institutions totaling \$4,698,053 bearing interest at rates ranging from 4.85% to 5.75%. Principal and interest payments ranged from \$397 to \$135,306 and were due monthly until maturity ranging from June 2020 through September 2023. The notes payable were secured by vehicles and furniture and equipment. During the year ended June 30, 2020, the balance due on the notes payable was paid in full and retired.

In May 2020, ILT Global was granted a forgivable loan (Loan) from Liberty Capital Bank in the aggregate amount of \$67,478, pursuant to the Paycheck Protection Program (PPP) as part of the Cononavirus Aid, Relief and Economic Security Act (CARES Act), which was enacted March 27, 2020. The Loan matures on May 5, 2022, and bears interest at a rate of 1.00% per annum, payable monthly commencing on December 5, 2020. The Loan may be repaid by ILT Global at any time prior to maturity with no prepayment penalties. Funds from the Loan may only be used for payroll costs, costs used to continue group health care benefits, mortgage payments rent, utilities and interest on other debt obligations incurred before February 15, 2020. The School intends to use the entire Loan amount for qualifying expenses.

## International American Education Federation, Inc. Notes to Consolidated Financial Statements

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Under the terms of the Paycheck Protection Program (PPP), certain amounts of the Loan may be forgiven if they are used for qualifying expenses as described in the CARES Act.

In April 2020, the School entered into a line of credit agreement with a bank whereby it may borrow up to \$35,000,000, with interest due at the greater of 3.15% or LIBOR (.60% at June 30, 2020). Interest payments are due monthly with principal due upon maturity on April 23, 2023. As of June 30, 2020, \$15,000,000 in advances were outstanding on the agreements. The line is collateralized under the master trust indenture.

In April 2020, the School entered into a separate line of credit agreement with a bank whereby it may borrow up to \$10,000,000, with interest due at the greater of 4.00% or LIBOR (.60% at June 30, 2020). Interest payments are due monthly with principal due upon maturity on April 23, 2023. As of June 30, 2020, \$10,000,000 in advances were outstanding on the line of credit. The line is collateralized under the master trust indenture.

Future maturities on the lines of credit and note payable are as follows for the years ending June 30:

2021	\$	25,918
2022		41,560
2023		<u>25,000,000</u>
	\$	<u><u>25,067,478</u></u>

Interest expense on long-term debt for the year ended June 30, 2020 totaled \$27,279,763.

### 8. Net Assets with Donor Restrictions

Net assets with donor restrictions represent state resources to be used for educational purposes.

### 9. Defined Benefit Pension Plan

The School participates in a cost-sharing multiple-employer defined benefit pension plan that has a special funding situation. The plan is administered by the Teacher Retirement System of Texas (TRS).

TRS's defined benefit pension plan (Plan) is established and administered in accordance with the Texas Constitution, Article XVI, Section 67 and Texas Government Code, Title 8, Subtitle C. The pension trust fund is a qualified pension trust under Section 401(a) of the Code. The Texas Legislature establishes benefits and contribution rates within the guidelines of the Texas Constitution. The Plan's Board of Trustees does not have the authority to establish or amend benefit terms.

## International American Education Federation, Inc.

### Notes to Consolidated Financial Statements

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All employees of public, state-supported educational institutions in Texas who are employed for one-half or more of the standard work load and who are not exempted from membership under Texas Government Code, Title 8, Section 822.002 are covered by the Plan. TRS provides service and disability retirement, as well as death and survivor benefits, to eligible employees (and their beneficiaries) of public and higher education in Texas.

The pension formula is calculated using 2.3 percent (multiplier) times the average of the five highest annual creditable salaries times years of credited service to arrive at the annual standard annuity except for members who are grandfathered, the three highest annual salaries are used. The normal service retirement is at age 65 with 5 years of credited service or when the sum of the member's age and years of credited service equals 80 or more years. Early retirement is at age 55 with 5 years of service credit or earlier than 55 with 30 years of service credit.

There are additional provisions for early retirement if the sum of the member's age and years of service credit total at least 80, but the member is less than age 60 or 62 depending on date of employment, or if the member was grandfathered in under a previous rule. There are no automatic post-employment benefit changes; including automatic COLAs. Ad hoc post-employment benefit changes, including ad hoc COLAs can be granted by the Texas Legislature as noted in the Plan description above. Texas Government Code section 821.006 prohibits benefit improvements, if, as a result of the particular action, the time required to amortize TRS' unfunded actuarial liabilities would be increased to a period that exceeds 31 years, or, if the amortization period already exceeds 31 years, the period would be increased by such action.

In May, 2019, the 86th Texas Legislature approved the TRS Pension Reform Bill (Senate Bill 12) that provides for gradual contribution increases from the state, participating employers and active employees to make the pension fund actuarially sound.

This action causing the pension fund to be actuarially sound, allowed the legislature to approve funding for a 13th check in September 2019. All eligible members retired as of December 31, 2018 received an extra annuity check in either the matching amount of their monthly annuity or \$2,000, whichever was less.

Contribution requirements are established or amended pursuant to Article 16, section 67 of the Texas Constitution which requires the Texas legislature to establish a member contribution rate of not less than 6% of the member's annual compensation and a state contribution rate of not less than 6% and not more than 10% of the aggregate annual compensation paid to members of the system during the fiscal year. Employee contribution rates are set in state statute, Texas Government Code 825.402. The TRS Pension Reform Bill (Senate Bill 12) of the 86th Texas Legislature amended Texas Government Code 825.402 for member contributions and increased employee and employer contribution rates for fiscal years 2020 thru 2025.

Assets contributed by one charter school or Independent School District (ISD) may be used for the benefit of an employee of another ISD or charter school. The unfunded obligations get passed along to the other charter schools and ISDs.

## International American Education Federation, Inc. Notes to Consolidated Financial Statements

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There is not a withdrawal penalty for leaving the TRS system. Information with respect to the Plan and the School’s participation in the Plan for the year ended June 30, 2020 is as follows:

Legal Name of Plan:	Teacher Retirement System of Texas
EIN/Pension Plan Number:	N/A
Total Plan Assets:	\$183,275,667,769
Accumulated Benefit Obligations:	\$209,961,325,288
Plan funded percentage:	75.24% funded
Is plan covered by collective bargaining agreements?	No
Employer contributions to the plan:	\$2,101,501
Contributions greater than 5% of total plan contributions?	No
Contribution rates:	
Member	7.7%
Non-Employer Contributing Entity (State)	7.5%
Employers	7.5%

### 10. Health Care Coverage

During the year ended June 30, 2020, full-time employees of the School were covered by a health insurance plan. The School contributed \$367 per month per employee for the period from September 1, 2019 to June 30, 2020 to the plan.

Employees, at their option, authorized payroll withholdings to pay contributions or premiums for their dependents. All premiums were paid to licensed insurers.

### 11. Commitments and Contingencies

The School receives funds through state and federal programs that are governed by various statutes and regulations. State program funding is based primarily on student attendance data submitted to TEA and is subject to audit and adjustment.

Expenses charged to federal programs are subject to audit and adjustment by the grantor agency. The programs administered by the School have complex compliance requirements and, should state or federal auditors discover areas of noncompliance, funds may be subject to refund if so determined by the TEA or other grantor agency.



## International American Education Federation, Inc.

### Notes to Consolidated Financial Statements

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#### ***Litigation***

The School is contingently liable in connection with certain claims and contracts, including those currently in litigation, arising in the normal course of its activities. Although there are inherent uncertainties in any litigation, the School's management and general counsel are of the opinion that the outcome of such matters will not have a material effect on the School's financial position.

#### ***Uncertainties***

In March 2020, the World Health Organization recognized the novel strain of coronavirus, COVID-19, as a pandemic. As result of the global coronavirus pandemic of 2020, the financial picture for school districts has seen an unanticipated change. To reduce the chance of spreading COVID-19, in March 2020, public schools were closed for in-person instruction through the remainder of the 2019-2020 school year. Immediately following the school closures, ILTexas deployed a virtual platform where teachers taught and students attended class remotely. While ILTexas did not miss a single day of instruction through the transition, there may be short and long-term implications for the instruction and student experience. The duration of these uncertainties and the ultimate financial effects cannot be reasonably estimated at this time.

On March 27, 2020, the Coronavirus Aid, Relief, and Economic Security Act (CARES) was signed into law. On May 5, 2020, ILT Global received a loan in the amount of \$67,478 pursuant to the Paycheck Protection Program. ILT Global anticipates using all of the proceeds to make eligible payments and, therefore, expects substantially all of the loan will be forgiven.

The CARES Act also created Elementary and Secondary School Emergency Relief Fund (ESSER) specifically for emergency aid grants to public school districts for expenses related to the disruption of campus operations due to COVID-19 and also direct aid to cover costs associated with the significant changes to the delivery of instruction due to COVID-19.

The School's allotment totaled \$3,507,804 under this program. The ESSER allotment for the 2020-2021 school year is in place of the final Foundation School Program (FSP) allotment for the 2019-2020 school year; therefore the School has reduced FSP revenue for the year ended June 30, 2020 accordingly.

Charter schools are able to decide whether to provide instruction virtually or face to face for the 2020-2021 school year. Currently, it is not possible to estimate the full extent of any potential impacts to the School or to determine if any changes in fair values are other than temporary in nature. Accordingly, no adjustments to the financial statements were made as a result of these events.

## International American Education Federation, Inc. Notes to Consolidated Financial Statements

### 12. Functional Allocation of Expenses

#### *Functional allocation of expenses*

Expenses are reported by their functional classification as program services or management and general or fundraising. Program services are the direct conduct or supervision of activities that fulfill the purposes for which the School exists. Fundraising activities include the solicitation of contributions of money, securities, material, facilities, other assets, and time. Management and general activities are not directly identifiable with specific program or fundraising activities.

Expenses that are attributable to one or more program or supporting activities are allocated among the activities benefited. Salaries and related costs are charged directly either to program services, fundraising or administration based on actual time worked in each area. Information technology costs, depreciation, interest expense, and occupancy costs are allocated based on whether the costs are associated with instructional campuses (program services) or with administrative buildings.

The School's expenses by natural classification and function are as follows for the year ended June 30, 2020:

	Payroll Costs	Professional & Contracted Services	Supplies & Materials	Other Operating Costs	Debt	Total
<b>Program Services:</b>						
Instructional and Instructional related services	\$ 86,236,030	\$ 3,953,580	\$ 7,715,559	\$ 1,950,629	\$ 20,940,043	\$ 120,795,841
Instructional and school leadership	1,199,095	72,560	6,123	43,915	326,796	1,648,489
Support Services - Student	7,786,876	10,320,213	239,282	714,344	1,858,958	20,919,673
Support Services - Nonstudent based	2,088,999	10,235,695	752,742	13,420,534	535,696	27,033,666
Ancillary services	638,232	606,960	354,812	17,070	175,344	1,792,418
<b>Total program services</b>	<b>97,949,232</b>	<b>25,189,008</b>	<b>9,068,518</b>	<b>16,146,492</b>	<b>23,836,837</b>	<b>172,190,087</b>
<b>Support Services:</b>						
Instructional and school leadership	9,209,559	55,204	92,631	50,512	2,506,822	11,914,728
Administrative support services	4,464,679	871,333	76,684	1,382,017	1,127,473	7,922,186
Support services - nonstudent based	1,639,302	1,369,963	754,015	1,439,454	430,234	5,632,968
Fundraising	-	-	-	6,360	-	6,360
<b>Total support services</b>	<b>15,313,540</b>	<b>2,296,500</b>	<b>923,330</b>	<b>2,878,343</b>	<b>4,064,529</b>	<b>25,476,242</b>
<b>Total expenses</b>	<b>\$ 113,262,772</b>	<b>\$ 27,485,508</b>	<b>\$ 9,991,848</b>	<b>\$ 19,024,835</b>	<b>\$ 27,901,366</b>	<b>\$ 197,666,329</b>

## International American Education Federation, Inc. Notes to Consolidated Financial Statements

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### 13. Liquidity and Availability of Resources

The School relies on state aid and federal grants to meet general expenditures related to operations. For purposes of analyzing resources available to meet general expenditures over a twelve-month period. The School considers all expenditures related to its ongoing activities of education as well as the conduct of services undertaken to support those activities, to be general expenditures.

As part of the School’s liquidity management, it structures its financial assets to be available as its general expenditures and liabilities become due or as additional funding opportunities are presented by maintaining a significant portion of its assets in cash.

The School’s financial assets available within one year of the consolidated statements of financial position date for general expenditure are as follows:

Financial assets at June 30, 2020:	
Cash and cash equivalents	\$ 58,456,344
Restricted cash and cash equivalents	56,469,244
Due from government agencies	27,413,333
Accounts receivable	<u>6,500</u>
	142,345,421
Less financial assets not available for general expenditure:	
Restricted cash and cash equivalents	<u>(45,979,895)</u>
Total financial assets available for general expenditure	<u><u>\$ 96,365,526</u></u>

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### 14. Subsequent Events

The School evaluated subsequent events through the date the financial statements were available to be issued, and concluded that no additional disclosures are required.

Supplemental Information

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**International American Education Federation, Inc**  
**Consolidating Statement of Financial Position**  
**June 30, 2020**

	International Leadership of Texas	International Leadership of Texas - Global	Eliminations	Total
<b>Assets</b>				
<b>Current assets:</b>				
Cash and cash equivalents	\$ 57,500,176	\$ 956,168	\$ -	\$ 58,456,344
Restricted cash and cash equivalents	56,351,739	117,505	-	56,469,244
Due from government agencies	27,413,333	-	-	27,413,333
Accounts receivable	-	6,500	-	6,500
Other current assets	194,376	-	-	194,376
<b>Total current assets</b>	<b>141,459,624</b>	<b>1,080,173</b>	<b>-</b>	<b>142,539,797</b>
Property and equipment, net	440,257,026	6,585	-	440,263,611
<b>Total assets</b>	<b>\$ 581,716,650</b>	<b>\$ 1,086,758</b>	<b>\$ -</b>	<b>\$ 582,803,408</b>
<b>Liabilities and Net Assets</b>				
<b>Current liabilities:</b>				
Accounts payable	\$ 1,057,021	\$ 2,550	\$ -	\$ 1,059,571
Accrued payroll	14,014,967	-	-	14,014,967
Accrued interest	13,365,876	-	-	13,365,876
Student activity funds	734,252	28,955	-	763,207
Deferred revenue	156,587	407,899	-	564,486
Other liability	600,000	49,062	-	649,062
Current maturities of finance lease liability	146,446	-	-	146,446
Current maturities of long-term debt	5,805,455	25,918	-	5,831,373
<b>Total current liabilities</b>	<b>35,880,604</b>	<b>514,384</b>	<b>-</b>	<b>36,394,988</b>
<b>Long-term liabilities:</b>				
Finance lease liability	157,855	-	-	157,855
Long-term debt, net of debt issuance costs	527,519,672	41,560	-	527,561,232
<b>Total liabilities</b>	<b>563,558,131</b>	<b>555,944</b>	<b>-</b>	<b>564,114,075</b>
<b>Net assets:</b>				
Without donor restrictions	1,865,609	530,814	-	2,396,423
With donor restrictions	16,292,910	-	-	16,292,910
<b>Total net assets</b>	<b>18,158,519</b>	<b>530,814</b>	<b>-</b>	<b>18,689,333</b>
<b>Total liabilities and net assets</b>	<b>\$ 581,716,650</b>	<b>\$ 1,086,758</b>	<b>\$ -</b>	<b>\$ 582,803,408</b>

See notes to consolidated financial statements.

**International American Education Federation, Inc**  
**Consolidating Statement of Activities**  
**Year Ended June 30, 2020**

	International Leadership of Texas	International Leadership of Texas - Global	Eliminations	Total
<b>Revenue and support:</b>				
<b>Local support:</b>				
SSA - Local revenues from member districts	\$ 734,240	\$ 2,131,394	(734,240)	\$ 2,131,394
Interest, dividends, gains, and losses	629,581	-	-	629,581
Foundations, other non-profit organizations, gifts, and bequests	91,850	17,798	-	109,648
Other revenues from local sources	730,906	136,317	-	867,223
Food service activity	1,103,931	-	-	1,103,931
<b>Total local support</b>	<b>3,290,508</b>	<b>2,285,509</b>	<b>(734,240)</b>	<b>4,841,777</b>
<b>State program revenues:</b>				
Per capita apportionment	5,640,996	-	-	5,640,996
Foundation school program act revenue	180,681,158	-	-	180,681,158
State program revenue distributed by TEA	1,653,550	-	-	1,653,550
<b>Total state program revenue</b>	<b>187,975,704</b>	<b>-</b>	<b>-</b>	<b>187,975,704</b>
<b>Federal program revenues:</b>				
National school breakfast and lunch program	7,733,983	-	-	7,733,983
Federal program revenue distributed by TEA	6,251,270	-	-	6,251,270
Federal revenues distributed by other State of Texas agencies	6,906,250	-	-	6,906,250
<b>Total federal program revenue</b>	<b>20,891,503</b>	<b>-</b>	<b>-</b>	<b>20,891,503</b>
<b>Total revenue and support</b>	<b>212,157,715</b>	<b>2,285,509</b>	<b>(734,240)</b>	<b>213,708,984</b>

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See notes to consolidated financial statements.

**International American Education Federation, Inc**  
**Consolidating Statement of Activities**  
**Year Ended June 30, 2020**

	International Leadership of Texas	International Leadership of Texas - Global	Eliminations	Total
<b>Expenses:</b>				
Instruction	\$ 92,039,160	\$ 1,029,554	\$ (734,240)	\$ 92,334,474
Instruction resources and media	883,303	-	-	883,303
Curriculum and instructional staff development	6,638,021	-	-	6,638,021
Instructional leadership	1,320,821	-	-	1,320,821
School leadership	9,408,778	-	-	9,408,778
Guidance, counseling, evaluation services	4,871,333	-	-	4,871,333
Social work services	88,658	-	-	88,658
Health services	1,429,905	-	-	1,429,905
Student transportation	1,229,552	-	-	1,229,552
Food services	10,102,452	-	-	10,102,452
Extracurricular activities	1,338,815	-	-	1,338,815
General administration	5,764,872	1,029,841	-	6,794,713
Facilities maintenance and operations	25,010,072	-	-	25,010,072
Security and monitoring services	1,487,898	-	-	1,487,898
Data processing services	5,202,734	-	-	5,202,734
Community services	1,617,074	-	-	1,617,074
Debt service	27,901,366	-	-	27,901,366
Fundraising	6,360	-	-	6,360
<b>Total expenses</b>	<b>196,341,174</b>	<b>2,059,395</b>	<b>(734,240)</b>	<b>197,666,329</b>
<b>Excess of revenues over expenses from operations</b>	<b>15,816,541</b>	<b>226,114</b>	<b>-</b>	<b>16,042,655</b>
<b>Non-operating activities:</b>				
Other gain	220,033	-	-	220,033
<b>Total non-operating activities</b>	<b>220,033</b>	<b>-</b>	<b>-</b>	<b>220,033</b>
<b>Change in net assets</b>	<b>16,036,574</b>	<b>226,114</b>	<b>-</b>	<b>16,262,688</b>
<b>Net assets at beginning of year</b>	<b>2,121,945</b>	<b>304,700</b>	<b>-</b>	<b>2,426,645</b>
<b>Net assets at end of year</b>	<b>\$ 18,158,519</b>	<b>\$ 530,814</b>	<b>\$ -</b>	<b>\$ 18,689,333</b>

See notes to consolidated financial statements.

Supplemental Information Required by TEA

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**International Leadership of Texas**  
**Statement of Financial Position**  
**June 30, 2020**

**Assets**

**Current assets:**

Cash and cash equivalents	\$ 57,500,176
Restricted cash and cash equivalents	56,351,739
Due from government agencies	27,413,333
Other current assets	<u>194,376</u>

**Total current assets** 141,459,624

Property and equipment, net 440,257,026

**Total assets** \$ 581,716,650

**Liabilities and Net Assets**

**Current liabilities:**

Accounts payable	\$ 1,057,021
Accrued payroll	14,014,967
Accrued interest	13,365,876
Student activity funds	734,252
Deferred revenue	156,587
Other liability	600,000
Current maturities of finance lease liability	146,446
Current maturities of long-term debt	<u>5,805,455</u>

**Total current liabilities** 35,880,604

**Long-term liabilities:**

Finance lease liability	157,855
Long-term debt, net of debt issuance costs	<u>527,519,672</u>

**Total liabilities** 563,558,131

**Net assets:**

Without donor restrictions	1,865,609
With donor restrictions	<u>16,292,910</u>

**Total net assets** 18,158,519

**Total liabilities and net assets** \$ 581,716,650

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See notes to consolidated financial statements.

## International Leadership of Texas Statement of Activities Year Ended June 30, 2020

	<u>Without donor restrictions</u>	<u>With donor restrictions</u>	<u>Total</u>
<b>Revenue and support:</b>			
<b>Local support:</b>			
5722 SSA - Local revenues from member districts	\$ 734,240	\$ -	\$ 734,240
5742 Interest, dividends, gains, and losses	629,581	-	629,581
5744 Foundations, other non-profit organizations, gifts, and bequests	91,850	-	91,850
5749 Other revenues from local sources	730,906	-	730,906
5751 Food service activity	1,103,931	-	1,103,931
<b>Total local support</b>	3,290,508	-	3,290,508
<b>State program revenues:</b>			
5811 Per capita apportionment	-	5,640,996	5,640,996
5812 Foundation school program act revenue	-	180,681,158	180,681,158
5829 State program revenue distributed by TEA	-	1,653,550	1,653,550
<b>Total state program revenue</b>	-	187,975,704	187,975,704
<b>Federal program revenues:</b>			
5921 National school breakfast and lunch program	-	7,733,983	7,733,983
5929 Federal program revenue distributed by TEA	-	6,251,270	6,251,270
5939 Federal revenues distributed by other State of Texas agencies	-	6,906,250	6,906,250
<b>Total federal program revenue</b>	-	20,891,503	20,891,503
Net assets released from restrictions			
Restrictions satisfied by payments	196,341,174	(196,341,174)	-
<b>Total revenue and support</b>	199,631,682	12,526,033	212,157,715

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See notes to consolidated financial statements.

## International Leadership of Texas Statement of Activities Year Ended June 30, 2020

	Without donor restrictions	With donor restrictions	Total
<b>Expenses:</b>			
11 Instruction	\$ 92,039,160	\$ -	\$ 92,039,160
12 Instruction resources and media	883,303	-	883,303
13 Curriculum and instructional staff development	6,638,021	-	6,638,021
21 Instructional leadership	1,320,821	-	1,320,821
23 School leadership	9,408,778	-	9,408,778
31 Guidance, counseling, evaluation services	4,871,333	-	4,871,333
32 Social work services	88,658	-	88,658
33 Health services	1,429,905	-	1,429,905
34 Student transportation	1,229,552	-	1,229,552
35 Food services	10,102,452	-	10,102,452
36 Extracurricular activities	1,338,815	-	1,338,815
41 General administration	5,764,872	-	5,764,872
51 Facilities maintenance and operations	25,010,072	-	25,010,072
52 Security and monitoring services	1,487,898	-	1,487,898
53 Data processing services	5,202,734	-	5,202,734
61 Community services	1,617,074	-	1,617,074
71 Debt service	27,901,366	-	27,901,366
81 Fundraising	6,360	-	6,360
<b>Total expenses</b>	<b>196,341,174</b>	<b>-</b>	<b>196,341,174</b>
<b>Excess of revenues over expenses from operations</b>	<b>3,290,508</b>	<b>12,526,033</b>	<b>15,816,541</b>
<b>Non-operating activities:</b>			
7959 Other gain	220,033	-	220,033
<b>Total non-operating activities</b>	<b>220,033</b>	<b>-</b>	<b>220,033</b>
<b>Change in net assets</b>	<b>3,510,541</b>	<b>12,526,033</b>	<b>16,036,574</b>
<b>Net assets (deficit) at beginning of year</b>	<b>(1,644,932)</b>	<b>3,766,877</b>	<b>2,121,945</b>
<b>Net assets at end of year</b>	<b>\$ 1,865,609</b>	<b>\$ 16,292,910</b>	<b>\$ 18,158,519</b>

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See notes to consolidated financial statements.

## International Leadership of Texas

### Statement of Cash Flows

### Year Ended June 30, 2020

<b>Cash flows from operating activities:</b>	
Change in net assets	\$ 16,036,574
Adjustments to reconcile change in net assets to net cash provided by operating activities	
Depreciation	13,796,891
Amortization of bond premium	(361,708)
Amortization of debt issuance costs	448,335
Changes in assets and liabilities:	
Due from government agencies	124,639
Other receivable	116,779
Other current assets	46,149
Accounts payable	(1,264,424)
Accrued payroll	1,325,253
Accrued interest	472,993
Student activity funds	(61,408)
Deferred revenue	(220,168)
Other liability	600,000
Net cash provided by operating activities	31,059,905
<b>Cash flows from investing activities:</b>	
Proceeds from sale of investments	16,098,557
Purchases of property and equipment	(4,743,402)
Net cash provided by investing activities	11,355,155
<b>Cash flows from financing activities:</b>	
Net proceeds from issuance of long-term debt	25,000,000
Principal payments on finance lease liabilities	(3,246,290)
Principal payments on long-term debt	(7,194,614)
Net cash provided by financing activities	14,559,096
Net increase in cash and cash equivalents	56,974,156
<b>Cash and restricted cash and cash equivalents at beginning of year</b>	<b>56,877,759</b>
<b>Cash and restricted cash and cash equivalents at end of year</b>	<b>\$ 113,851,915</b>
<b>Reconciliation of cash and restricted cash and cash equivalents reported within the statement of financial position to the statement of cash flows:</b>	
Cash and cash equivalents	\$ 57,500,176
Restricted cash and cash equivalents	56,351,739
<b>Cash and restricted cash and cash equivalents reported on the statement of cash flows</b>	<b>\$ 113,851,915</b>
<b>Supplemental disclosure of cash flow information:</b>	
Cash paid for interest	\$ 30,566,314
<b>Supplemental schedule of noncash investing and financing activities:</b>	
Property and equipment acquired through finance lease	\$ 358,920

See notes to consolidated financial statements.

**International Leadership of Texas**  
**Schedule of Expenses**  
**Year Ended June 30, 2020**

Object Code	Description	Amount
6100	Payroll costs	\$112,896,724
6200	Professional and contracted services	27,393,678
6300	Supplies and materials	9,826,565
6400	Other operating costs	18,322,841
6500	Debt service	27,901,366
	Total expenses	<u>\$196,341,174</u>

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See notes to consolidated financial statements.

**International Leadership of Texas**  
**Schedule of Capital Assets**  
**June 30, 2020**

Description	Ownership Interest	
	Local	State
1510 Land	\$ 519,788	\$ 38,319,936
1520 Buildings and improvements	4,376,666	425,369,863
1531 Vehicles	74,806	3,059,192
1549 Furniture and equipment	743,325	15,595,548
1580 Construction in progress	-	3,978,239
1570 Accumulated depreciation	(1,022,634)	(50,757,703)
	<u>\$ 4,691,951</u>	<u>\$ 435,565,075</u>

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See notes to consolidated financial statements.

## International Leadership of Texas Budgetary Comparison Schedule Year Ended June 30, 2020

	Budgeted Amounts		Actual Amounts	Variance from Final Budget
	Original	Final		
<b>Revenue and support:</b>				
<b>Local support:</b>				
5722 SSA- Local revenues from member districts	\$ 650,000	\$ 734,240	\$ 734,240	\$ -
5742 Interest, dividends, gains, and losses	-	629,581	629,581	-
5744 Foundations, other non-profit organizations, gifts, and bequests	3,500	91,850	91,850	-
5749 Other revenues from local sources	695,650	730,906	730,906	-
5750 Food service activity	1,679,620	1,103,931	1,103,931	-
<b>State program revenues:</b>				
5811 Per capita apportionment	7,010,453	5,640,996	5,640,996	-
5812 Foundation school program act revenue	177,928,767	180,681,158	180,681,158	-
5829 State program revenue distributed by TEA	1,907,000	1,653,550	1,653,550	-
<b>Federal program revenues:</b>				
5920 Federal program revenue distributed by TEA	22,301,630	20,891,503	20,891,503	-
<b>Total revenue and support</b>	<b>212,176,620</b>	<b>212,157,715</b>	<b>212,157,715</b>	<b>-</b>
<b>Expenses:</b>				
11 Instruction	97,778,651	92,039,160	92,039,160	-
12 Instruction resources and media	1,014,102	883,303	883,303	-
13 Curriculum and instructional staff development	8,260,031	6,638,021	6,638,021	-
21 Instructional leadership	1,537,749	1,320,821	1,320,821	-
23 School leadership	9,653,236	9,408,778	9,408,778	-
31 Guidance, counseling, evaluation services	5,530,639	4,871,333	4,871,333	-
32 Social work services	110,891	88,658	88,658	-
33 Health services	1,783,625	1,429,905	1,429,905	-
34 Student transportation	1,719,724	1,229,552	1,229,552	-
35 Food services	8,388,928	10,102,452	10,102,452	-
36 Extracurricular activities	1,916,646	1,338,815	1,338,815	-
41 General administration	5,742,511	5,764,872	5,764,872	-
51 Facilities maintenance and operations	24,874,420	25,010,072	25,010,072	-
52 Security and monitoring service	2,434,988	1,487,898	1,487,898	-
53 Data processing services	6,287,083	5,202,734	5,202,734	-
61 Community services	1,245,190	1,617,074	1,617,074	-
71 Debt service	31,789,635	27,901,366	27,901,366	-
81 Fundraising	-	6,360	6,360	-
<b>Total expenses</b>	<b>210,068,049</b>	<b>196,341,174</b>	<b>196,341,174</b>	<b>-</b>
<b>Excess revenues over expenses from operations</b>	<b>2,108,571</b>	<b>15,816,541</b>	<b>15,816,541</b>	<b>-</b>
<b>Non-operating activities:</b>				
7959 Other gain	-	220,033	220,033	-
<b>Total non-operating activities</b>	<b>-</b>	<b>220,033</b>	<b>220,033</b>	<b>-</b>
<b>Change in net assets</b>	<b>2,108,571</b>	<b>16,036,574</b>	<b>16,036,574</b>	<b>-</b>
<b>Net assets at beginning of year</b>	<b>2,121,945</b>	<b>2,121,945</b>	<b>2,121,945</b>	<b>-</b>
<b>Net assets at end of year</b>	<b>\$ 4,230,516</b>	<b>\$ 18,158,519</b>	<b>\$ 18,158,519</b>	<b>\$ -</b>

See notes to consolidated financial statements.

## Compliance Reports

draft



**Independent Auditors' Report on Internal Control over Financial Reporting and on Compliance and Other Matters Based on an Audit of Financial Statements Performed in Accordance with *Government Auditing Standards***

Board of Directors  
International American Education Federation, Inc.

We have audited the consolidated financial statements of International American Education Federation, Inc. (School) (a nonprofit Organization), which comprise the consolidated statement of financial position as of June 30, 2020, and the related consolidated statements of activities and cash flows for the year then ended, and the related notes to the consolidated financial statements, and have issued our report thereon dated September 16, 2020. We conducted our audit in accordance with U.S. generally accepted auditing standards and the standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States. The consolidated financial statements of International Leadership of Texas – Global were not audited in accordance with *Government Auditing Standards* and accordingly this report does not include reporting on internal controls over financial reporting or instances of reportable noncompliance associated with International Leadership of Texas – Global.

***Internal Control over Financial Reporting***

draft

In planning and performing our audit of the consolidated financial statements, we considered the School's internal control over financial reporting (internal control) to determine the audit procedures that are appropriate in the circumstances for the purpose of expressing our opinion on the consolidated financial statements, but not for the purpose of expressing an opinion on the effectiveness of the School's internal control. Accordingly, we do not express an opinion on the effectiveness of the School's internal control.

A *deficiency in internal control* exists when the design or operation of a control does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, misstatements on a timely basis. A *material weakness* is a deficiency, or a combination of deficiencies, in internal control, such that there is a reasonable possibility that a material misstatement of the School's financial statements will not be prevented, or detected and corrected on a timely basis. A *significant deficiency* is a deficiency, or a combination of deficiencies, in internal control that is less severe than a material weakness, yet important enough to merit attention by those charged with governance.

Our consideration of internal control was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control that might be material weaknesses or significant deficiencies. Given these limitations, during our audit we did not identify any deficiencies in internal control that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

### ***Compliance and Other Matters***

As part of obtaining reasonable assurance about whether the School's financial statements are free from material misstatement, we performed tests of its compliance with certain provisions of laws, regulations, contracts, and grant agreements, noncompliance with which could have a direct and material effect on the determination of financial statement amounts. However, providing an opinion on compliance with those provisions was not an objective of our audit, and accordingly, we do not express such an opinion. The results of our tests disclosed no instances of noncompliance or other matters that are required to be reported under *Government Auditing Standards*.

### ***Purpose of this Report***

The purpose of this report is solely to describe the scope of our testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the School's internal control or on compliance. This report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the School's internal control and compliance. Accordingly, this communication is not suitable for any other purpose.

draft  
A Limited Liability Partnership

Arlington, Texas  
September     , 2020

## **Independent Auditors' Report on Compliance for Each Major Federal Program and on Internal Control over Compliance Required by the Uniform Guidance**

Board of Directors  
International American Education Federation, Inc.

### ***Report on Compliance for Each Major Federal Program***

We have audited International American Education Federation, Inc.'s (School) (a nonprofit Organization) compliance with the types of compliance requirements described in the *OMB Compliance Supplement* that could have a direct and material effect on each of the School's major federal programs for the year ended June 30, 2020. The School's major federal programs are identified in the summary of auditors' results section of the accompanying schedule of findings and questioned costs.

### ***Management's Responsibility***

Management is responsible for compliance with federal statutes, regulations, and the terms and conditions of its federal awards applicable to its federal programs.

### ***Auditors' Responsibility***

draft

Our responsibility is to express an opinion on compliance for each of the School's major federal programs based on our audit of the types of compliance requirements referred to above. We conducted our audit of compliance in accordance with U.S. generally accepted auditing standards; the standards applicable to financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; and the audit requirements of Title 2 U.S. *Code of Federal Regulations Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance). Those standards and the Uniform Guidance require that we plan and perform the audit to obtain reasonable assurance about whether noncompliance with the types of compliance requirements referred to above that could have a direct and material effect on a major federal program occurred. An audit includes examining, on a test basis, evidence about the School's compliance with those requirements and performing such other procedures as we considered necessary in the circumstances.

We believe that our audit provides a reasonable basis for our opinion on compliance for each major federal program. However, our audit does not provide a legal determination of the School's compliance.

### ***Opinion on Each Major Federal Program***

In our opinion, the School complied, in all material respects, with the types of compliance requirements referred to above that could have a direct and material effect on its major federal programs for the year ended June 30, 2020.

## ***Report on Internal Control over Compliance***

Management of the School is responsible for establishing and maintaining effective internal control over compliance with the types of compliance requirements referred to above. In planning and performing our audit of compliance, we considered the School's internal control over compliance with the types of requirements that could have a direct and material effect on each major federal program to determine the auditing procedures that are appropriate in the circumstances for the purpose of expressing an opinion on compliance for each major federal program and to test and report on internal control over compliance in accordance with Uniform Guidance, but not for the purpose of expressing an opinion on the effectiveness of internal control over compliance. Accordingly, we do not express an opinion on the effectiveness of the School's internal control over compliance.

*A deficiency in internal control over compliance* exists when the design or operation of a control over compliance does not allow management or employees, in the normal course of performing their assigned functions, to prevent, or detect and correct, noncompliance with a type of compliance requirement of a federal program on a timely basis. *A material weakness in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance, such that there is a reasonable possibility that material noncompliance with a type of compliance requirement of a federal program will not be prevented, or detected and corrected, on a timely basis. *A significant deficiency in internal control over compliance* is a deficiency, or combination of deficiencies, in internal control over compliance with a type of compliance requirement of a federal program that is less severe than a material weakness in internal control over compliance, yet important enough to merit attention by those charged with governance.

Our consideration of internal control over compliance was for the limited purpose described in the first paragraph of this section and was not designed to identify all deficiencies in internal control over compliance that might be material weaknesses or significant deficiencies. We did not identify any deficiencies in internal control over compliance that we consider to be material weaknesses. However, material weaknesses may exist that have not been identified.

The purpose of this report on internal control over compliance is solely to describe the scope of our testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Accordingly, this report is not suitable for any other purpose.

A Limited Liability Partnership

Arlington, Texas  
September    , 2020

## International American Education Federation, Inc. Schedule of Findings and Questioned Costs Year Ended June 30, 2020

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### Section I – Summary of Auditors’ Results

#### **Consolidated Financial Statements**

Type of auditor’s report issued: Unmodified

Internal control over financial reporting:

- Material weaknesses identified? \_\_\_ yes X no
- Significant deficiencies identified? \_\_\_ yes X none reported

Noncompliance material to consolidated financial statements noted? \_\_\_ yes X no

#### **Federal Awards**

Internal control over major programs:

- Material weaknesses identified? \_\_\_ yes X no
- Significant deficiencies identified? \_\_\_ yes X none reported

Type of auditors’ report issued on compliance for major programs: Unmodified

Any audit findings disclosed that are required to be reported in accordance with 2 CFR 200.516(a)? \_\_\_ yes X no

Identification of major federal programs or cluster:

Child Nutrition Cluster	CFDA 10.553 and 10.555
Charter School Program	CFDA 84.282A
Child and Adult Care Food Program	CFDA 10.558

Dollar threshold used to distinguish between type A and type B programs: \$750,000

Auditee qualified as low-risk auditee? X yes      \_\_\_ no

### Section II – Financial Statement Findings

Audit findings: None

### Section III – Federal Award Findings and Questioned Costs

Audit findings: None

### Section IV – Summary of Prior Year Audit Findings

Audit findings: None

**International American Education Federation, Inc.**  
**Schedule of Expenditures of Federal Awards**  
**Year Ended June 30, 2020**

Federal Grantor/ Pass through Grantor/ Program or Cluster Title	Federal CFDA Number	Pass-through Entity Identifying Number	Federal Expenditures
U.S. Department of Agriculture:			
Passed through Texas Education Agency:			
School Breakfast Program	10.553	71401901	\$ 1,733,546
National School Lunch Program	10.555	71301901	5,665,361
Passed through Texas Department of Agriculture:			
Commodities - Noncash assistance	10.555	3001201	<u>335,076</u>
Total Child Nutrition Cluster			7,733,983
Child and Adult Care Food Program	10.558	N/A	<u>1,624,265</u>
Total U.S. Department of Agriculture			9,358,248
U.S. Department of Education:			
Passed through Texas Education Agency:			
ESEA Title I Part A - Improving Basic Programs	84.010A	2061014057848	484,820
Passed through Region X Education Service Center:			
ESEA Title I Part A - Improving Basic Programs	84.010A	2061014057848	<u>3,994,504</u>
Total CFDA 84.010			4,479,324
Passed through Texas Education Agency:			
Special Education-Grants to States (IDEA, Part B)	84.027A	206600010578486000	2,470,907
Charter School Program	84.282A	185901017110013	2,497,657
Career and Technical - Basic Grant	84.048	20420006057848	207,088
Passed through Region X Education Service Center:			
ESEA Title II Part A - Teacher & Principal Training	84.367A	20694501057848	548,430
Summer School LEP	84.369A	69551902	286,517
Title III, Language Instruction LEP	84.365A	20671001057848	<u>452,534</u>
Total U.S. Department of Education			10,942,457
U.S. Department of Health and Human Services			
Passed through State Department of Health and Human Services:			
Medicaid Administrative Claiming Program	93.778	N/A	<u>46,531</u>
Total Expenditures of Federal Awards			<u><u>\$ 20,347,236</u></u>

See notes to schedule of expenditures of federal awards.

# International American Education Federation, Inc.

## Notes to Schedule of Expenditures of Federal Awards

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### 1. Basis of Presentation

The accompanying schedule of expenditures of federal awards (Schedule) presents the activity of all applicable federal award programs of the International American Education Federation, Inc. (School). The information in this Schedule is presented in accordance with the requirements of Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance).

Because the Schedule presents only a selected portion of the operations of the School, it is not intended to and does not present the financial position, changes in net assets or cash flows of the School.

Expenditures reported on the Schedule are reported on the accrual basis of accounting. Such expenditures are recognized following the cost principles in Uniform Guidance, or the cost principles contained in the Uniform Guidance, wherein certain types of expenditures are not allowable or are limited as to reimbursement. The School has elected not to use the 10 percent de minimis indirect cost rate as allowed under the Uniform Guidance.

### 2. Non-Cash Federal Awards

The School received non-cash awards in the form of food commodities totaling \$335,076 for the year ended June 30, 2020.

draft

## Cover Sheet

### CONSIDER/ACT ON POSSIBLY INITIATING LAWSUIT REGARDING 7811 UNIVERSITY HILLS PROPERTY

**Section:** VII. Other Board Items for Discussion/Action  
**Item:** C. CONSIDER/ACT ON POSSIBLY INITIATING LAWSUIT REGARDING  
7811 UNIVERSITY HILLS PROPERTY  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** HBDOCS-#908318-v1-Contract\_of\_Sale\_(Seller\_signed).PDF



**CONTRACT OF SALE**

**THIS CONTRACT OF SALE** (the "Contract") is made and entered into by and between **BAYCO PROPERTIES LTD.**, a Texas limited partnership ("Seller") and **INTERNATIONAL AMERICAN EDUCATION FEDERATION, INC.**, d/b/a **INTERNATIONAL LEADERSHIP OF TEXAS**, a Texas non-profit corporation, and/or assigns ("Purchaser"). Seller and Purchaser are sometimes hereafter referred to individually as the "Party" or collectively as the "Parties".

**WITNESSETH:**

**WHEREAS**, Seller is the owner of a tract of land being approximately 26.63 acres of land located at 7811 University Hills, Dallas, Dallas County, Texas 75241, together with all rights, title and interest of Seller in and to any adjacent roads, streets, alleys, easements, appurtenances and rights-of-way within the boundaries so described, being more particularly described on Exhibit "A", which is attached hereto and incorporated herein by reference for all purposes as if set forth in full (collectively, the "Property"); and

**WHEREAS**, Seller desires to convey the Property to Purchaser, and Purchaser desires to purchase the Property from Seller upon the terms and conditions and for the consideration hereinafter set forth.

**NOW, THEREFORE**, for and in consideration of the premises, promises, mutual covenants, conditions and obligations contained herein, and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, Seller agrees to sell and convey the Property to Purchaser and Purchaser agrees to purchase and pay Seller for the Property as follows:

**ARTICLE I  
PURCHASE PRICE**

1.01 **Purchase Price:** The Purchase Price for the Property shall be Three Million Eighty Thousand and No/100 Dollars (\$3,080,000.00), hereinafter called the "Purchase Price".

1.02 **Payment at Closing:** The Purchase Price shall be payable in full at the time of Closing (as hereinafter defined) in U.S. funds in cash or its equivalent

**ARTICLE II  
EARNEST MONEY**

2.01 **Earnest Money.** Within three (3) business days after the Effective Date (defined below) of this Contract, Purchaser shall deposit the sum of Forty Thousand and No/100 Dollars (\$40,000.00) ("Earnest Money") with Community National Title, 14800 Quorum Drive, Suite 150, Dallas, Texas 75254, Attn: Candie Sandlin (the "Title Company"), to be held by the Title Company pursuant to the terms of this Contract. The Earnest Money, less the Independent Contract Consideration described in Section 2.02 hereof, shall be refundable to Purchaser in accordance with the terms of this Contract. The Earnest Money shall be placed by the Title Company in an interest-bearing account. The Earnest Money, together with accrued interest thereon, shall be released by the Title Company in accordance with the terms of this Contract, specifically, upon the Closing of the transaction contemplated hereby if Closing actually occurs, or as otherwise designated pursuant to the terms of this Contract. The Earnest Money shall be applied toward the Purchase Price. The Title Company shall provide written notice to Seller within one (1) business day of the receipt of the Earnest Money. Failure of Purchaser to deposit the Earnest Money with the Title Company as provided in this Section 2.01 shall, at Seller's option, cause this Contract to be rendered null

and void and of no further force or effect, and, if so terminated by Seller, the parties shall automatically be released from all obligations one to the other hereunder.

2.02 Independent Contract Consideration. Included in the deposit of the Earnest Money described in Section 2.01 hereof, is the amount of Two Hundred Fifty and No/100 Dollars (\$250.00) (the "Independent Contract Consideration"), which amount has been bargained for and agreed to as consideration for Seller's execution and delivery of this Contract. The Independent Contract Consideration is in addition to and independent of all other consideration provided in this Contract (but shall apply to the Purchase Price), and is non-refundable in all events. If Purchaser fails to timely deliver the entire Independent Contract Consideration, then this Contract shall be terminated at the option of Seller, Purchaser shall be entitled to receive a refund of its Earnest Money held by the Title Company, and the Parties shall have no further obligations to each other hereunder.

### ARTICLE III SURVEY, TITLE, AND ENVIRONMENTAL SITE ASSESSMENT

3.01 Survey. Within fifteen (15) days after the Effective Date (defined below) of this Contract, Seller shall deliver or cause to be delivered to Purchaser and the Title Company a current plat of an on-the-ground boundary survey (hereinafter referred to as the "Survey") of the Property prepared by a duly licensed Texas land surveyor (hereinafter referred to as the "Surveyor"). The Survey shall be made in accordance with Texas Society of Professional Surveyors' Standards for a Category 1A survey, identify the Property, locate accurately (and identify by volume and page reference, if applicable) all physical conditions affecting the Property, including, but not limited to, the dimensions and location of all improvements, fences, drainage ditches, easements (identifying the easements by recording dates, if applicable), power lines, highways, roads, streets, alleys, lakes, creeks, ponds, watercourses, and shall show any encroachments, conflicts, or protrusions on the Property. The Survey will contain the Surveyor's certification as to the number of acres and gross square feet contained in the Property. The metes and bounds legal description of the Property as prepared by such Surveyor shall be certified and used in the conveyance of the Property. Seller and Purchaser shall share equally in the cost of the Survey.

3.02 Title Policy. Within ten (10) days after the Effective Date of this Contract, Seller shall, at Seller's sole cost and expense, deliver or cause to be delivered to Purchaser a copy of: (i) a current commitment for an Owner's Policy of Title Insurance (hereinafter referred to as the "Title Commitment") covering the Property setting forth the state of title of the Property and binding the Title Company to issue to Purchaser a Texas Owner's Policy of Title Insurance on the standard form of policy, prescribed by the Texas State Board of Insurance at Closing in the amount of the Purchase Price; and (ii) legible copies of all documents referred to in the Title Commitment as exceptions to title or otherwise constituting exceptions to title. Title to the Property shall be conveyed free and clear of all liens, encumbrances, easements, assessments, restrictions, and tenancies, and exceptions to title caused or suffered by Seller or anyone claiming by or through Seller except the following (collectively, the "Permitted Exceptions"): (i) the lien of taxes not yet due and payable; (ii) any declaration of restrictions, grant of easements and/or common area maintenance agreements applicable to the Property; (iii) the title insurer's standard printed exceptions; and (iv) those exceptions which are approved or deemed approved by Purchaser as set forth in writing by Purchaser. The term "Permitted Exceptions" shall mean all matters either shown on the Survey or in the Title Commitment and not objected to by Purchaser (with the exception of Schedule C of the Title Commitment, which shall be resolved at Closing, and which shall be deemed objected to by Purchaser), and all matters which Purchaser has accepted or has been deemed to accept. Seller has no obligation to ensure that the Title Company will provide any endorsements to the Title Policy, including, without limitation, any deletion of the printed survey exception, all of which, if Purchaser elects to obtain any such endorsements, shall be Purchaser's responsibility and shall be at Purchaser's sole cost and expense.

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**ARTICLE IV  
REVIEW OF SURVEY AND TITLE COMMITMENT**

4.01 Review. Purchaser shall have five (5) business days after the date of receipt of the last of: (a) the Survey; (b) the Title Commitment; and (c) all of the documents referred to as exceptions to title ("Title Review Period"), within which to review and give Seller written notice of its objection to or approval of, the condition of title reflected by the Survey, the Title Commitment, and the provisions of any document referred to in the Title Commitment as exceptions to title or otherwise constituting exceptions to title. If Purchaser, subject to the limitations herein contained, objects in writing to any such item within the Title Review Period, Seller shall be given fifteen (15) days from receipt of Purchaser's written objections to eliminate or modify such items to the sole satisfaction of Purchaser ("Seller's Title Cure Period"). Seller is under no obligation to cure such objections. In the event Seller is unable or unwilling to eliminate or modify such items or cure such title deficiencies to the sole satisfaction of Purchaser, or cannot cure such objections, Purchaser shall either: (i) accept such title as Seller can deliver; or (ii) terminate this Contract by giving notice in writing to Seller within three (3) days following the earlier to occur of (A) the expiration of Seller's Title Cure Period; or (B) receipt by Purchaser of written notice from Seller describing which title deficiencies cannot or will not be cured, at which time the Title Company shall unconditionally return, after deducting the Independent Contract Consideration, the Earnest Money and any interest thereon immediately to Purchaser. If Purchaser shall fail to timely object to the Title Commitment, Survey, and documents constituting exceptions to title, then Purchaser shall be deemed to have accepted all matters relating to the Title Commitment, Survey and documents constituting exceptions to title and deemed to have waived any further rights to object to title of the Property; or if Purchaser shall fail to give such written notice of termination within the period required herein, then Purchaser shall be deemed to have accepted all matters relating to the Title Commitment, Survey and documents constituting exceptions to title, not timely objected to as aforesaid and deemed to have waived any further rights to object to title of the Property and same shall be deemed to be Permitted Exceptions.

**ARTICLE V  
APPROVALS AND INSPECTIONS**

5.01 Inspection Period.

(i) Purchaser shall have ninety (90) days after the Effective Date (hereinafter referred to as the "Inspection Period") within which to conduct a due diligence inspection of the Property which may include, but shall not be limited to, engineering and feasibility studies on the subject Property. Buyer, upon notice to Seller, may extend its due diligence period up to two (2) additional thirty (30) day inspection extensions at no additional cost. Upon reasonable notice to Seller, Purchaser may conduct such studies or tests, including without limitation: soil tests, topographical studies, engineering studies and feasibility tests and other similar work. In conducting any inspections, investigations, examinations, or tests of the Property, Purchaser and its agents and representatives shall: (a) not damage any part of the Property; (b) not injure or otherwise cause bodily harm to Seller or its agents, guests, invitees, contractors and employees; (c) maintain or cause to be maintained by its agent commercial general liability (occurrence basis) insurance in terms and amounts reasonably satisfactory to Seller covering any accident arising in connection with the presence of Purchaser, its agents, and its representatives on the Property, and shall deliver a certificate of insurance verifying such coverage (and naming Seller as an additional insured) to Seller prior to entry upon the Property; (d) promptly pay when due the costs of all tests, investigations, and examinations done with regard to the Property; (e) not permit any liens to attach to the Property by reason of the exercise of its rights hereunder; and (f) fully restore the Property to the same condition in which the same was found before any such inspection or tests were undertaken. Purchaser further agrees that in the event this Contract does not close through no fault of Seller, and the condition of the Property is altered due to tests and

inspections performed by Purchaser or on Purchaser's behalf, then Purchaser shall restore the Property to its original condition or replace any damage to the Property resulting from Purchaser's entry onto the Property. Purchaser hereby agrees to indemnify, defend and hold Seller harmless from and against any and all liens, claims, demands, damages, causes of action, liabilities and expenses (including reasonable attorney's fees and costs, asserted against or incurred by Seller arising out of Purchaser's due diligence inspection of the Property), and this indemnification shall survive termination hereof.

(ii) Seller shall deliver to Purchaser within fifteen (15) days of the Effective Date the following documents to the extent they are in Seller's possession: copies of any Environmental Site Assessment reports; copies of operating expense statements and real estate tax bills for the prior three years; copies of any lease agreements; and any information, documents or reports regarding current tenants, if any, planned or recent capital expenditures, improvements, maintenance reports or significant repairs performed by Seller on or about the Property.

(iii) Seller makes no representations or warranties of any nature, express or implied, regarding the accuracy or completeness of the information described in Section 5.01(ii) above. Should Purchaser use or rely on the Environmental Reports, Purchaser shall do so at Purchaser's sole risk. Purchaser, its agents, consultants and employees, shall not disclose any information provided to Purchaser under this Contract to any third party without Seller's prior written approval.

(iv) During the Inspection Period, Purchaser shall, in its sole discretion, determine whether the Property is suitable to Purchaser, which shall include diligently pursuing from the City of Dallas such approvals and permits necessary to construct a charter school on the Property ("City Approval"). Should the Property not prove satisfactory for any reason in the sole opinion of the Purchaser, this Contract may be canceled at Purchaser's option by Purchaser giving written notice of same to Seller on or before the expiration of the Inspection Period and any extensions permitted under Section 5.01(i) hereof, in which case this Contract shall terminate automatically and unconditionally, and the Title Company is directed to refund the Earnest Money and all interest accrued thereon immediately to Purchaser, less the Independent Contract Consideration and Reimbursement Amount set forth in the following paragraph, and the parties shall have no further liability one to the other except as to Purchaser's indemnification to Seller described in Section 5.01(i) to repair or restore the Property and its indemnification of Seller. If Purchaser has not notified Seller and the Title Company in writing on or before the expiration of the Inspection Period, and any extensions permitted under Section 5.01(i) hereof, that the Property is not satisfactory, then Purchaser shall be deemed to have approved the Property in all respects including exceptions to the title and the Survey, the Earnest Money shall vest in Seller and shall be nonrefundable, and the parties shall proceed to Closing.

(v) Purchaser acknowledges that any and all of the Documents provided to Purchaser are proprietary and confidential in nature and will be delivered to Purchaser solely to assist Purchaser in determining the feasibility of purchasing the Property. "Documents" shall mean all environmental reports, and any other writing prepared by third parties provided to Purchaser by Seller regarding the Property. Purchaser agrees not to disclose the contents of the Documents to any party outside of Purchaser's organization except to certain of its attorneys, accountants, consultants, lenders, engineers or investors (collectively, the "Permitted Outside Parties") or as otherwise may be required by law. Should Purchaser use or rely on the environmental reports, Purchaser shall do so at Purchaser's sole risk. Purchaser, its agents, consultants and employees, shall not disclose any information provided to Purchaser under this Contract to any third party without Seller's prior written approval.

(vi) Purchaser shall return all of the Documents on the earlier to occur of: (i) such time as Purchaser determines that it shall not acquire the Property; or, (ii) such time as this Contract is terminated for any reason.

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**CONTRACT OF SALE – Page 4 of 15**

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(vii) Purchaser hereby acknowledges that Seller has not made and does not make any warranty or representation regarding the truth, accuracy, or completeness of the Documents or the source(s) thereof, and that Seller has not undertaken any independent investigation as to the truth, accuracy or completeness of the Documents and is providing the Documents solely as an accommodation to Purchaser. Seller expressly disclaims and Purchaser waives any and all liability for representations or warranties, express or implied, statements of fact, and other matters contained in the Documents or in oral communications made to Purchaser. Purchaser shall rely solely upon its own investigation with respect to the Property, including, without limitation, the Property's physical, environmental, or economic condition, compliance or lack of compliance with any ordinance, order, permit, or regulation or any other attribute or matter relating thereto.

## ARTICLE VI CLOSING AND REMEDIES

6.01 Closing. The Closing of the sale contemplated hereby shall be held at the Title Company on or before thirty (30) days after the expiration of the Inspection Period ("Closing Date") and the obtaining of any permits and zoning necessary for the operation of a Charter school as well as the approval of the Purchaser's Board of Directors at its first regular monthly meeting following Purchaser's obtaining the permits and zoning. Should the Board not approve the purchase and/or, if such permits and zoning are not obtained by December 1, 2020, then the Title Company shall immediately release the Earnest Money to Seller (which shall still be applied to the Purchase Price at Closing).

6.02 Obligation at Closing. At Closing, Seller shall deliver to Purchaser:

- (i) A duly executed and acknowledged Special Warranty Deed conveying the Property according to the legal description prepared by the Surveyor as shown on the Survey of the Property, subject only to the Permitted Exceptions;
- (ii) An Owner's Policy at Title Insurance issued by the underwriter for the Title Company pursuant to the Title Commitment and showing only the Permitted Exceptions;
- (iii) Possession of the Property, subject to the Permitted Exceptions;
- (iv) A certification of Seller in form satisfactory to Purchaser to the effect that Seller is not a "foreign person" as defined in 7701(a)(1) and 7701(a)(5) of the Internal Revenue Code of 1954, as amended;
- (v) An affidavit and agreement regarding debts and liens stating that there are no unpaid debts for any work that has been done or materials furnished to the Property prior to and as of Closing except as permitted by this Contract; and
- (vi) Such other documents as are customarily executed in the State of Texas in connection with the conveyance of real property, including all required Closing statements, releases, affidavits, evidences of authority to execute the documents, and any other instruments that may be reasonably required by the Title Company.

6.03 Purchaser's Obligations at Closing.

- (i) Purchaser shall deliver the Purchase Price less the Earnest Money pursuant to the terms of Sections 1.01 and 1.02 hereinabove.

- (ii) Such other documents as are customarily executed in the State of Texas in connection with the conveyance of real property, including all required Closing statements, releases, affidavits, evidences of authority to execute the documents, and any other instruments that may be reasonably required by the Title Company.

6.04 Documentation of Authority. Each Party will provide to the other or to the Title Company, or both, reasonable documentation as may be reasonably requested or required in order to confirm the proper authority of such Party to consummate the transaction contemplated by this Contract.

6.05 Closing Costs. Seller shall be responsible for the costs of the Title Commitment, release of Seller's loan liability, if any, one-half (1/2) of the cost of the Survey, tax statements or certificates, one-half (1/2) of any escrow fee, and the fees and expenses of Seller's attorneys. Purchaser shall be responsible for the costs of its due diligence efforts, its own attorneys fees, the cost of the premium for deletion of the Survey exception and any other deletions or coverages to the Title Insurance Policy requested by Purchaser, one-half (1/2) of the cost of the Survey, all loan expense fees, preparation of any deed of trust, recording fees for any deed of trust and security agreements, insurance premiums, one-half (1/2) of any escrow fee, and such other costs and expenses actually incurred by the Purchaser. Any other costs or charges of closing this transaction not specifically mentioned in this Contract shall be paid and adjusted in accordance with local custom in Dallas County, Texas.

6.06 Transfer of Title. Seller shall transfer title to the Property subject to the Permitted Exceptions, but otherwise free and clear of all debts, liens, mortgagees, tenant leases, or other liabilities and shall pay off and satisfy in full any such liabilities at Closing, other than the Permitted Exceptions.

6.07 Seller's Remedies. In the event Purchaser fails to close the transaction contemplated hereby or otherwise breaches its obligations hereunder, other than due to Seller's default hereunder or the termination hereof by Purchaser in strict accordance with the applicable provisions hereof, Seller shall be entitled to receive all Earnest Money and all interest earned thereon.

6.08 Purchaser's Remedies. If Seller fails to close the transaction contemplated hereby for any reason other than Purchaser's default hereunder or the termination hereof by Seller or Purchaser (except pursuant to this Paragraph 6.09) in strict accordance with the applicable provisions hereof, Purchaser may, as its sole and exclusive remedy, either: (a) terminate this Contract, and receive a full and immediate refund of the Earnest Money, or, in the alternative, (b) seek specific performance hereof (but not to cure title or any other defect applicable to the Property). Purchaser waives its rights to any other remedies provided at law or in equity. In no event shall Seller, its direct or indirect partners, shareholders, owners, or affiliates, any officer, director, employee, attorney, or agent of the foregoing, or any affiliate or controlling person thereof have any liability, beyond its interest in the property, for any claim, cause of action, or other liability arising out of or relating to this Contract or the Property, whether based on contract, common law, statute, equity or otherwise.

## **ARTICLE VII PRORATION**

7.01 Prorations. All normal and customarily proratable items, including, without limitation, real estate taxes and rents, shall be prorated as of the Closing, Seller being charged and credited for all of same up to and on the Closing Date and Purchaser being charged and credited for all of same after the Closing Date. If the Closing shall occur before the tax rate is fixed for the then current year, the apportionment of taxes shall be upon the basis of the tax rate for the immediately preceding year applied to the latest assessed valuation, provided, however, that in the event the tax rate and/or assessed valuation of the Property for the

year of Closing is changed from the rate and/or valuation used in the apportionment of taxes for the consummation of this transaction, then, upon receipt of the tax statement for the year of Closing, Purchaser shall notify Seller in writing of the changed rate and/or assessed valuation, whereupon Seller and Purchaser shall prorate said general real estate taxes based upon the actual tax rate and assessed valuation of the Property for the year of Closing and a cash settlement shall be made between Purchaser and Seller. Further, if the Property is assessed and taxed as a part of a larger parcel of real estate, then, for purposes of computing tax prorations hereunder, a proportionate part of the real estate taxes attributable to such larger parcel shall be allocated to Property on, the basis of the ratio between the number of acres comprising the Property and the total number of acres comprising the larger parcel of real estate. Purchaser shall be solely responsible for and pay all applicable rollback taxes assessed against the Property, if any. The provisions of this Article shall survive the Closing.

### **ARTICLE VIII REPRESENTATIONS, WARRANTIES AND COVENANTS OF SELLER**

For purposes of this Contract, wherever the terms "Seller's knowledge" or "to the best of Seller's knowledge" is used, it shall be limited to the actual knowledge (being the current, conscious awareness of facts or other information, without investigation or implied duty to investigate) of David L. Stephens; provided, however, the foregoing individual is acting for and on behalf and in his capacity as an officer of Seller or one or more of Seller's affiliates and is in no manner expressly or impliedly making any of these representations in his individual capacity, and Purchaser hereby waives any right to sue or to seek any judgment or claim against him on an individual basis. The term "to Seller's knowledge" or "to the best of Seller's knowledge" shall not include knowledge imputed to Seller from any other person. Seller hereby represents and warrants to Purchaser that to the best of Seller's knowledge, the following facts are, as of the date hereof, and will be, as of Closing, true and correct in all material respects.

8.01 Title. At Closing, Seller will have, and will convey, transfer and assign to Purchaser, good and indefeasible fee simple title to the Property by Special Warranty Deed, free and clear of any deed of trust, mortgages, liens, encumbrances, leases, security interest, judgments, encroachments and any and all other matters affecting title, except those items approved by Purchaser pursuant to the terms hereof or approved by Purchaser as stated herein. There is no litigation pending affecting title to the Property.

8.02 Authority. Seller has the right and capacity to enter into this Contract and perform its obligations hereunder.

8.03 Foreign Entity. Seller is not a "foreign person" within the meaning of Section 1445 of the Internal Revenue Code, and at the Closing, Seller will deliver a sworn "Non-Foreign Status Affidavit" to such effect to Purchaser.

8.04 No Outstanding Bills. Seller shall pay all bills and expenses of the Property prior to Closing, and Purchaser shall be obligated for such expenses thereafter, subject to the proration requirements contained herein.

8.05 Possession. There are no adverse or other parties in possession of the Land, or of any part thereof as lessees, tenants at sufferance, or trespassers.

8.06 Assessments. To the best of Seller's knowledge, there are no unpaid assessments (governmental or otherwise) for sewers, water, paving, electrical power or otherwise affecting the Property (matured or unmatured) and no such assessments, to Seller's knowledge are threatened.

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8.07 Survival. All of the representations, warranties and covenants of Seller made in this Article VIII shall specifically not survive the Closing and shall be merged therein. No other representations, warranties and covenants shall be deemed to have been made by Seller unless expressly set forth herein.

8.08 DISCLAIMERS AND RELEASES.

(A) SELLER IS SELLING THE PROPERTY STRICTLY ON AN "AS IS, WHERE IS" BASIS, "WITH ANY AND ALL FAULTS." SELLER MAKES NO REPRESENTATIONS OR WARRANTY WHATSOEVER, EXPRESS OR IMPLIED, EXCEPT AS EXPRESSLY SET FORTH IN THIS CONTRACT OR IN CLOSING DOCUMENTS, NOR IS ANY EMPLOYEE OR AGENT OF SELLER AUTHORIZED TO MAKE ANY REPRESENTATION OR WARRANTY AS TO THE QUALITY OF OR CONDITION OF THE PROPERTY, MERCHANTABILITY, SUITABILITY OR FITNESS OF THE PROPERTY FOR ANY USE WHATSOEVER, KNOWN OR UNKNOWN TO SELLER, OR COMPLIANCE WITH ANY ENVIRONMENTAL PROTECTION, POLLUTION, OR LAND USE LAWS, RULES, REGULATIONS, ORDERS, OR REQUIREMENTS INCLUDING, BUT NOT LIMITED TO, THOSE PERTAINING TO THE HANDLING, GENERATING, TREATING, STORING, OR DISPOSING OF ANY HAZARDOUS WASTE OR SUBSTANCE. IN NO EVENT SHALL SELLER BE RESPONSIBLE OR LIABLE FOR LATENT OR PATENT DEFECTS OR FAULTS, IF ANY, ON THE PROPERTY, OR FOR REMEDYING OR REPAIRING THE SAME INCLUDING, WITHOUT LIMITATION, DEFECTS RELATED TO ASBESTOS OR ASBESTOS-CONTAINING MATERIALS, CHEMICALS OR WASTE, OR FOR CONSTRUCTING OR REPAIRING ANY STREETS, UTILITIES OR OTHER IMPROVEMENTS SHOWN ON ANY PLAT OF THE PROPERTY. BY CLOSING THE PURCHASE AND SALE, PURCHASER WARRANTS THAT THE PURCHASER HAS FULLY INSPECTED THE PROPERTY, IS FULLY SATISFIED WITH THE SAME IN ALL RESPECTS "AS IS, WHERE IS, WITH ANY AND ALL FAULTS," IS NOT RELYING ON ANY REPRESENTATION OR WARRANTY OF SELLER, EXCEPT AS EXPRESSLY SET FORTH IN THIS CONTRACT IN PURCHASING THE PROPERTY FROM SELLER.

(B) PURCHASER ACKNOWLEDGES AND AGREES THAT IT IS EXPERIENCED IN ACQUIRING, OWNING, DEVELOPING, MARKETING, LEASING, OPERATING, MANAGING AND SELLING OF PROPERTIES SIMILAR TO THE PROPERTY, AND THAT PURCHASER SHALL, DURING THE REVIEW PERIOD, THOROUGHLY INSPECT, TEST, STUDY, REVIEW AND INVESTIGATE ALL ASPECTS OF THE PROPERTY TO ITS FULL SATISFACTION, AND THAT EXCEPT FOR THE WARRANTIES, REPRESENTATIONS AND COVENANTS OF SELLER MADE IN THIS CONTRACT OR IN CLOSING DOCUMENTS, PURCHASER IS RELYING SOLELY THEREON IN MAKING ITS DECISION TO ACQUIRE THE PROPERTY. PURCHASER FURTHER ACKNOWLEDGES AND AGREES THAT EXCEPT AS OTHERWISE SPECIFICALLY STATED IN THIS CONTRACT AND IN THE CLOSING DOCUMENTS EXECUTED IN CONNECTION HEREWITH, SELLER IS NOT MAKING, AND HEREBY SPECIFICALLY DISCLAIMS MAKING ANY WARRANTY, GUARANTY OR REPRESENTATION, OF ANY KIND OR CHARACTER, WHETHER EXPRESS, IMPLIED, STATUTORY OR ARISING BY OPERATION OF LAW, ORAL OR WRITTEN, PAST, PRESENT OR FUTURE, OF, AS TO, OR CONCERNING THE PROPERTY, INCLUDING, WITHOUT LIMITATION, (I) THE PHYSICAL AND ENVIRONMENTAL NATURE AND CONDITION OF THE PROPERTY, INCLUDING, WITHOUT LIMITATION, THE WATER, SOIL AND GEOLOGY, AND THE SUITABILITY THEREOF AND OF THE PROPERTY FOR ANY AND ALL ACTIVITIES AND USES WHICH PURCHASER MAY ELECT TO CONDUCT THEREON, AND THE EXISTENCE OF ANY ENVIRONMENTAL HAZARDS OR CONDITIONS THEREON (INCLUDING THE PRESENCE OF ASBESTOS OR OTHER HAZARDOUS SUBSTANCES) OR THE COMPLIANCE OF THE PROPERTY WITH ANY AND ALL APPLICABLE ENVIRONMENTAL LAWS, RULES OR REGULATIONS; (II) EXCEPT FOR ANY WARRANTIES CONTAINED IN THE



DOCUMENTS TO BE DELIVERED BY SELLER AT CLOSING, THE NATURE AND EXTENT OF ANY RIGHT-OF-WAY, LEASE, POSSESSION, LIEN, ENCUMBRANCE, LICENSE, RESERVATION, CONDITION OR OTHER MATTER AFFECTING TITLE; (III) THE COMPLIANCE OF THE PROPERTY OR ITS OPERATION WITH ANY LAWS, STATUTES, ORDINANCES, RULES, REQUIREMENTS OR REGULATIONS OF ANY GOVERNMENT OR OTHER BODY; (IV) THE ECONOMIC VIABILITY OR MARKETABILITY OF THE PROPERTY; (V) TAX MATTERS PERTAINING TO THE TRANSACTION CONTEMPLATED HEREBY; (VI) THE ACCURACY OR COMPLETENESS OF ANY REPORTS OR OTHER INFORMATION FURNISHED BY SELLER TO PURCHASER WITH RESPECT TO THE PROPERTY, INCLUDING, WITHOUT LIMITATION, ENGINEERING, FINANCIAL, ENVIRONMENTAL OR OTHER REPORTS, STUDIES OR INVESTIGATIONS, IF ANY; (VII) ZONING; (VIII) VALUATION; (IX) HABITABILITY; (X) MERCHANTABILITY; OR (XI) SUITABILITY OR FITNESS FOR A PARTICULAR PURPOSE. EXCEPT FOR THE REPRESENTATIONS, WARRANTIES AND COVENANTS OF SELLER AS SET FORTH HEREIN AND SELLER'S WARRANTIES SET FORTH IN THE CLOSING DOCUMENTS, PURCHASER HEREBY EXPRESSLY ACKNOWLEDGES AND AGREES THAT THE PURCHASE OF THE PROPERTY, AS PROVIDED FOR HEREIN, IS BEING MADE ON AN "AS IS" BASIS, "WITH ALL FAULTS," AND UPON CLOSING, PURCHASER SHALL ASSUME THE RISK THAT ADVERSE MATTERS, INCLUDING, WITHOUT LIMITATION, ADVERSE PHYSICAL AND ENVIRONMENTAL CONDITIONS, MAY EXIST WITH RESPECT TO THE PROPERTY AND WITH FULL KNOWLEDGE AND ACCEPTANCE BY PURCHASER OF ALL INFORMATION AND MATTERS DISCLOSED IN ANY AND ALL REPORTS, STUDIES, ASSESSMENTS, INVESTIGATIONS, PROPOSALS AND DOCUMENTS FURNISHED TO, OR OBTAINED BY, PURCHASER WITH RESPECT TO THE PROPERTY. FURTHER, PURCHASER ACKNOWLEDGES AND AGREES THAT THERE ARE NO ORAL AGREEMENTS, WARRANTIES OR REPRESENTATIONS, COLLATERAL TO OR AFFECTING THE TRANSACTION CONTEMPLATED HEREBY WHICH HAVE BEEN MADE BY SELLER OR ANY THIRD PARTY.

(C) ANY FACTUAL INFORMATION SUCH AS PROPERTY TAXES, UTILITY INFORMATION, FINANCIAL PROJECTIONS, PROPERTY DIMENSIONS, SQUARE FOOTAGE, OR SKETCHES SHOWN TO PURCHASER OR SET FORTH HEREIN ARE OR MAY BE APPROXIMATE. PURCHASER REPRESENTS TO SELLER THAT, EXCEPT AS EXPRESSLY SET FORTH OTHERWISE IN THIS AGREEMENT, PURCHASER HAS INSPECTED AND VERIFIED SUCH FACTS AND INFORMATION TO PURCHASER'S SATISFACTION, AND THAT NO LIABILITY FOR ANY INACCURACIES, ERRORS OR OMISSIONS WITH RESPECT THERETO IS ASSUMED BY SELLER OR OTHER AGENTS OR REPRESENTATIVES OF SELLER.

(D) WITHOUT LIMITING THE PROVISIONS OF THE FOREGOING PROVISIONS, EFFECTIVE UPON CLOSING, PURCHASER HEREBY UNCONDITIONALLY AND IRREVOCABLY RELEASES SELLER FROM ANY AND ALL CLAIMS, DEMANDS, ACTIONS, LIABILITIES, LOSSES, COSTS AND EXPENSES (INCLUDING, WITHOUT LIMITATION, REASONABLE ATTORNEYS' FEES) ARISING FROM OR RELATED TO THE PHYSICAL OR ENVIRONMENTAL CONDITION OF THE PROPERTY, SAVE AND EXCEPT FOR ANY ENVIRONMENTAL PROBLEM OR CONTAMINATION OF WHICH SELLER HAD CURRENT ACTUAL KNOWLEDGE AND FAILED TO DISCLOSE TO PURCHASER PRIOR TO CLOSING. THE RELEASE SET FORTH IN THIS SECTION SPECIFICALLY INCLUDES ANY CLAIMS UNDER ANY ENVIRONMENTAL LAWS. "ENVIRONMENTAL LAWS" INCLUDES, BUT IS NOT LIMITED TO, THE RESOURCE CONSERVATION AND RECOVERY ACT (42 U.S.C. 6901, ET SEQ.), THE COMPREHENSIVE ENVIRONMENTAL RESPONSE, COMPENSATION AND LIABILITY ACT OF 1980, AS AMENDED BY THE SUPERFUND AMENDMENTS AND REAUTHORIZATION ACT (42 U.S.C. 9601, ET SEQ.); THE CLEAN AIR ACT (42 U.S.C. 4701, ET SEQ.); THE EMERGENCY

PLANNING AND COMMUNITY RIGHT-TO-KNOW ACT (42 U.S.C. §1101, ET SEQ.); THE HAZARDOUS MATERIALS TRANSPORTATION ACT OF 1974 (49 U.S.C. §1801, ET SEQ.); THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. §1251, ET SEQ.); THE FEDERAL INSECTICIDE, FUNGICIDE AND RODENTICIDE ACT (7 U.S.C. §137, ET SEQ.); THE SAFE DRINKING WATER ACT (42 U.S.C. §3001, ET SEQ.); AND THE TOXIC SUBSTANCE CONTROL ACT (15 U.S.C. §2601, ET SEQ.), AS ANY OF THE SAME MAY BE AMENDED FROM TIME TO TIME, AND ANY COMPARABLE OR SUCCESSOR PROVISIONS OF FEDERAL, STATE OR LOCAL LAW, AND ANY REGULATIONS, ORDERS, RULES, PROCEDURES, GUIDELINES AND THE LIKE PROMULGATED IN CONNECTION THEREWITH.

(E) THE DISCLAIMERS AND RELEASES SET FORTH IN THIS SECTION 8.08 SHALL SURVIVE CLOSING AND SHALL NOT MERGE THEREIN OR INTO ANY DOCUMENTS EXECUTED IN CONNECTION THEREWITH, AND SHALL BE SET FORTH IN THE SPECIAL WARRANTY DEED TO BE DELIVERED AT CLOSING.

8.09 From the Effective Date until the Closing Date, Seller shall promptly notify Purchaser in writing of any litigation, arbitration or administrative hearing before any court or governmental agency concerning or affecting the Property, which is instituted or threatened and Seller has received written notice to that effect after the Effective Date.

#### ARTICLE IX NOTICES

9.01 Notices. Any notice to be given or to be served upon any Party hereto, in connection with this Contract, must be in writing, and may be given by certified or registered mail and shall be deemed to have been given and received when a certified or registered letter containing such notice, properly addressed, with postage prepaid is deposited in the United States mails; and if given otherwise than by certified or registered mail, it shall be deemed to have been given when delivered to and received by the Party to whom it is addressed. Notices, consents or other communications given by electronic mail ("e-mail") shall be deemed to have been delivered when receipt of e-mail has been confirmed in writing by the receiving Party. Such notices shall be given to the Parties hereto at the following addresses:

**TO SELLER:**

Bayco Properties Ltd.  
c/o David L. Stephens  
P. O. Box 260711  
Plano, Texas 75026  
Tel: (972) 383-1595  
e-mail: [milstep1@hotmail.com](mailto:milstep1@hotmail.com)

**COPY TO:**

Richard P. Bobowski, Esq.  
Friedman & Feiger, L.L.P.  
5301 Spring Valley Road, Suite 200  
Dallas, Texas 75254  
Tel. (972) 788-1400  
e-mail: [rbobowski@fflawoffice.com](mailto:rbobowski@fflawoffice.com)

**TO PURCHASER:**

International Leadership of Texas  
Attn: \_\_\_\_\_  
1820 N. Glenville Drive, Suite 100  
Richardson, Texas 75081  
Tel: \_\_\_\_\_  
e-mail: \_\_\_\_\_

**COPY TO:**

Colliers International  
Attn: Will Haynes II  
1717 McKinney Avenue, Suite 900  
Dallas, Texas 75202  
Tel: 469-667-8870  
e-mail: [will.haynes@colliers.com](mailto:will.haynes@colliers.com)

**ARTICLE XI  
MISCELLANEOUS PROVISIONS**

9.01 Firm Offer. Seller's execution of this Contract constitutes an offer to sell the Property. Unless this Contract is accepted by Purchaser and a fully executed copy is delivered to Seller and the Title Company within five (5) days of the date Seller executed this Contract, then the offer of this Contract is fully revoked.

9.02 Effective Date. The Effective Date ("Effective Date") of this Contract shall be the last date on which Purchaser and Seller each have signed this Contract.

9.03 Calculation of Time. If the final date of any period falls upon a Saturday, Sunday or legal holiday under the laws of the State of Texas, then in such event the time of such period shall be extended to the next business day which is not a Saturday, Sunday or legal holiday under the laws of the State of Texas.

9.04 Entire Agreement. This Contract contains the complete agreement between the Parties and cannot be varied except by the written agreement of the Parties. The Parties agree that there are no oral agreements, understandings, representations, or warranties which are not expressly set forth herein. Any portion of this Contract not otherwise consummated at the Closing will survive the Closing of this transaction as a continuing agreement by and between the Parties.

9.05 Binding Agreement. All of the terms and conditions of this Contract shall be binding upon and inure to the benefit of the respective heirs, legal representatives, successors and assigns of all the Parties hereto.

9.06 Time. Time is of the essence of this Contract.

9.07 Captions. The captions used in connection with, Sections of this Contract are for convenience only and shall not be deemed to construe or limit the meaning of the language of the Contract.

9.08 Multiple Counterparts. This Contract may be executed in any number of counter-parts, each of which shall be an original, but all of which together shall constitute but one instrument.

9.09 Attorney's Fees. Should the Parties to this Contract, after having made all possible reasonable efforts to resolve their differences, be forced to litigate their respective rights pursuant to this Contract, the Party prevailing shall have the right to indemnity by the opposing Party for an amount equal to the prevailing Parties' reasonable attorney's fees, court costs, and expenses growing out of the litigation between the Parties.

9.10 Assignment of Contract. Purchaser may assign this Contract and its rights hereunder to an affiliate

registered to do business in the State of Texas, provided such entity shall be controlled, controlling or under the common control with Purchaser (hereinafter called the "Assignee"). In the event of such assignment of this Contract to Assignee (a) Purchaser shall notify Seller not less than ten (10) days prior to the Closing Date; (b) Assignee shall assume all obligations of Purchaser under this Contract; and (c) from and after any such assignment the term "Purchaser" shall be deemed to mean the Assignee under any such assignment. The foregoing notwithstanding, the Purchaser shall remain liable for all of its obligations hereunder. Other than as stated herein, no assignment hereunder shall be recognized or enforced unless first approved in writing by Seller in its sole discretion.

9.11 Legal Construction. In case any one or more of the provisions contained in this Contract shall for any reason be held to be invalid, illegal or unenforceable in any respect, such invalidity, illegality or unenforceability shall not affect any other provision of this Contract, and this Contract shall be construed as if such invalid, illegal and unenforceable provision had never been contained in this Contract.

9.12 Email Scan. An email scan of a duly executed counterpart of this Contract shall be sufficient to evidence the binding agreement of each Party to the terms hereof. However, each Party agrees to promptly return to the other an original, duly executed counterpart of this Contract following the delivery of an e-mailed image thereof.

9.13 Governing Law. This Contract shall be governed by and construed in accordance with the laws of the State of Texas. Venue in this case of any dispute hereunder shall be in Dallas County, Texas.

9.14 Survival of Covenants. Except as otherwise stated in this Contract, any of the representations, warranties, covenants, and agreements of Seller, as well as any rights and benefits of the parties' pertaining to a period of time following Closing contemplated hereby, shall not survive Closing and shall be merged therein.

9.15 Brokerage Fees and Commissions. Seller and Purchaser hereby warrant and represent to the other that there are no brokers other than Colliers International North Texas LLC, Attn: Steve Everbach ("Broker"), involved in this transaction. Seller shall pay Broker a commission of three percent (3%) ("Brokerage Fee") of the Purchase Price only in the event Closing and funding of this Contract. Seller and Purchaser hereby warrant and represent to the other, and it is agreed, that if any claims for brokerage commissions or fees, or finder's or other similar fees, are ever made against Seller or Purchaser in connection with the transaction evidenced by this Contract, all such claims shall be handled and paid by the Party whose commitments form the basis of such claim. It is further agreed that each Party agrees to indemnify and hold harmless the other from and against any and all such claims, demands, liability, loss, cost, damage or expense (including, but not limited to, reasonable attorneys' fees and costs of litigation) with respect to any brokerage fees or agents' commissions or other compensation asserted by any person, firm, or corporation in connection with this Contract or the transactions contemplated hereby insofar as any such compensation is based upon a contract or commitment of the indemnifying Party. The Texas Real Estate License Act requires written notice to Purchaser that Purchaser should have an attorney examine an abstract of title to the Property or obtain a policy of title insurance. Notice to that effect is, therefore, hereby given to Purchaser. The provisions of this Section 9.15 of this Contract shall survive the Closing.

9.16 Like-Kind Exchange. Purchaser acknowledges that Seller, at any time prior to Closing, may elect, in writing, to affect a like-kind exchange under Section 1031 of the Internal Revenue Code of 1954, as amended. Accordingly, if prior to Closing, the Seller elect to treat this transaction as a Section 1031 exchange, the Seller may designate a property or properties (hereinafter collectively referred to as the "Exchange Property") as being suitable for acquisition by the Seller, and the Purchaser will cooperate fully with the Seller in effecting such exchange and Purchaser hereby agrees to execute those documents required by Seller, the Title Company and the intermediary necessary for the completion of the tax free exchange.

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Notwithstanding the foregoing, however, Purchaser's agreement to cooperate with Seller shall not, under any circumstances, (a) require Purchaser to take title to any property other than the Property (even for a temporary period of time), (b) require the expenditure of funds by Purchaser beyond its agreed to Closing costs as specified herein, (c) require Purchaser to bear any additional costs or expenses (including legal fees in reviewing any proposed exchange transaction or the documents relating to same), or (d) delay Closing of the transaction contemplated under this Contract (unless Purchaser agrees to such a delay in writing).

9.17 Return of Proprietary Information. In the event this Contract terminates for any reason, Purchaser shall, no later than five (5) days after the termination date: (i) return to Seller all those items described in the Contract that Seller delivered to Purchaser and all copies that Purchaser made of those items; and (ii) deliver copies of all inspection and assessment reports, including the environmental reports, related to the Property that Purchaser completed or caused to be completed. This Section 9.17 shall survive termination of this Contract.

9.18 No Recordation. Without the prior written consent of Seller, there shall be no recordation of either this Contract or any memorandum hereof, or any affidavit pertaining hereto, and any such recordation of this Contract or memorandum hereto by Purchaser without the prior written consent of Seller shall constitute a default hereunder by Purchaser, whereupon this Contract shall, at the option of Seller, terminate and be of no further force and effect. Upon termination, all Earnest Money shall be immediately delivered to Seller, whereupon the parties shall have no further duties or obligations one to the other except as provided in Section 5.01.

IN WITNESS WHEREOF, the Parties have executed this Contract on the dates shown below.

**SELLER:**

**BAYCO PROPERTIES LTD.,**  
a Texas limited partnership

By: Bayco Group Management Company, L.L.C.,  
its General Partner

By: \_\_\_\_\_  
David L. Stephens, President

Date: May 28, 2020.

**PURCHASER:**

**INTERNATIONAL LEADERSHIP OF TEXAS,**  
a Texas non-profit corporation, and/or assigns

By: \_\_\_\_\_  
Name: \_\_\_\_\_  
Title: \_\_\_\_\_

Date: May \_\_\_\_, 2020.

**ACCEPTANCE BY THE TITLE COMPANY**

Community National Title hereby acknowledges receipt of the foregoing Contract and agrees to accept, hold, and return the Earnest Money and to disburse any funds received thereunder in accordance with the provisions of such Contract.

**EARNEST MONEY** received and the instructions contained in the foregoing Contract acknowledged this \_\_\_\_ day of \_\_\_\_\_, 2020.

**Community National Title**

14800 Quorum Drive, Suite 150  
Dallas, Texas 75254  
Telephone: 972-528-6071, ext. 1036

By: \_\_\_\_\_  
Candie Sandlin, Escrow Officer

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**EXHIBIT "A"****LEGAL DESCRIPTION**

BEING a 26.68 acre tract of land situated in the MORRIS FERRIS SURVEY, ABSTRACT NO. 460, DALLAS County, Texas. Said 26.68 acre tract of land being all of those two certain tracts of land conveyed to Cottrell Properties, L.P. as recorded in Volume 2000065, Page 01191, Deed Records, DALLAS County, Texas. Said 26.68 acre tract of land being more particularly described by metes and bounds as follows:

BEGINNING a 1/2 inch iron rod found, being in the West line of Houston School Road, a public right of way, and being a distance of 1283.86 feet from a 5/8 inch iron rod found at the intersection of the North line of Wheatland Road and the West line of said Houston School Road, also being the Northeast corner of that certain tract of land as conveyed to Louise Coleman as recorded in Volume 95247, Page 1680, said Deed Records;

THENCE North 89 degrees 58 minutes 59 seconds West, along the North line of said Coleman tract, passing a 5/8 inch iron rod at a distance of 710.03 feet and being 0.8 feet offset to the North and being at the Northwest corner of that certain tract of land as conveyed to Rebecca Sneed as recorded in Volume 2000141, Page 05301, said Deed Records, and continue generally along a barbed wire fence, a total distance of 1299.66 feet to a 1/2 inch iron rod set, from which a 2 inch pipe found bears, South 42 degrees 07 minutes 07 seconds West, 1.90 feet, said 1/2 inch iron rod being in the East line of Lot 13, of HI-VU Terrace Addition, an Addition to the City of Dallas, Texas, as recorded in Volume 9, Page 221, Map Records, Dallas County, Texas;

THENCE North 00 degrees 05 minutes 48 seconds East, generally along a fence and along the East line of said HI-VU Addition, a distance of 76.01 feet to a 1/2 inch iron pipe found, being the Southeast corner of that certain tract of land as conveyed to Dallas Independent School District (D.I.S.D.) as recorded in Volume 327, Page 0347, said Deed Records, said pipe also being the Northeast corner of the said HI-VU Terrace Addition;

THENCE North 00 degrees 04 minutes 08 seconds East, along the East line of said D.I.S.D. tract, a distance of 12.80 feet to a 5/8 inch iron rod found, being the Southeast corner of the Wisdom Terrace Addition, an Addition to the City of Dallas as recorded in Volume 2002009, Page 61, said Map Records;

THENCE North 00 degrees 16 minutes 33 seconds East, generally along a barbed wire fence and along the East line of said Wisdom Terrace Addition, a distance of 809.51 feet to a 1/2 inch iron rod set, being the Southwest corner of that certain tract of land as conveyed to Leroy Wiggins as recorded in Volume 98156, Page 4239, said Deed Records;

THENCE South 89 degrees 47 minutes 34 seconds East, generally along a barbed wire fence and along the South line of said Wiggins tract, a distance of 1294.20 feet to a 1/2 inch iron rod set, being in the West line of said Houston School Road;

THENCE South 00 degrees 05 minutes 28 seconds East, generally along a barbed wire fence and along the West line of said Houston School Road, a distance of 894.02 feet to the POINT OF BEGINNING and CONTAINING 26.68 acres of land, more or less.


LESS that certain 2,173 square foot tract conveyed by Bayco Properties Ltd. to the City of Dallas and more particularly described in Special Warranty Deed recorded on May 5, 2009 as Document Number 200900127391, in the Official Public Records of Dallas County, Texas.

## Cover Sheet

### CONSIDER/ACT ON CONTRACT WITH KEY CONSTRUCTION FOR TEMPORARY SCHOOL AT ILTEXAS AGGIELAND HS

**Section:** VII. Other Board Items for Discussion/Action  
**Item:** D. CONSIDER/ACT ON CONTRACT WITH KEY CONSTRUCTION FOR  
TEMPORARY SCHOOL AT ILTEXAS AGGIELAND HS  
**Purpose:** Vote  
**Submitted by:**  
**Related Material:** 100% Template ILT Temp High School.pdf



ILT Temp High School GMP		College Station, Texas	
September 9th, 2020			
DESCRIPTION		BIDS 100% - SEPTEMBER	NOTES
D-1	CLEANING	\$ 8,000.00	
	STORAGE CONTAINERS	\$ 4,500.00	ALLOWANCE
	MOVING COMPANY	\$ 3,000.00	ALLOWANCE
	MATERIAL TESTING	\$ 911.00	
	TEMP FENCE	\$ 1,200.00	
D-3	SITE CONCRETE & PLUMBING POUR BACKS	\$ 25,000.00	TOTAL CONCRETE
	8" FOAM FILL AT MULTIPURPOSE ROOM	\$ -	NA
	12" PLUMBING SLAB ALLOWANCE	\$ -	NA
D-5	MISC STEEL & ERECTION (BOLLARDS, LINTELS, BRACES, ETC)	\$ 10,345.00	
D-6	ROUGH CARPENTRY	\$ -	WITH DRYWALL
	FINISH CARPENTRY (Install doors, toilet acc, partitions, signage)	\$ 8,150.00	
	MILLWORK & RE-SKIN ARCHITECTURAL CASEWORK AT LOBBY	\$ 36,745.00	ADDED MILLWORK
D-7	THERMAL INSULATION	\$ -	NA
	TPO MEMBRANE ROOFING PATCHWORK FOR NEW PENETRATIONS	\$ 9,600.00	
	WATERPROOFING	\$ 2,500.00	ALLOWANCE
D-8	HOLLOW METAL/WOOD DOORS	\$ 32,110.00	
	MATCH EXISTING DOOR CYLINDERS	\$ 10,000.00	ALLOWANCE
	REMOVE/REPLACE EXISTING GLASS AT LOBBY TO RE-SKIN CASEWORK	\$ 24,700.00	ADDED GLASS DOORS
D-9	METAL STUD FRAMING, DRYWALL, INSULATION (New Walls)	\$ 143,994.00	
	TOUCH UP EXISTING ROOMS THAT ARE TO REMAIN	\$ -	WITH DRYWALL
	ACOUSTICAL CEILING	\$ 65,300.00	
	DRYWALL CEILINGS	\$ -	WITH DRYWALL
	MINOR FLOOR PREP	\$ -	WITH FLOORING
	BATHROOM WALL TILE WAINSCOT	\$ -	WITH FLOORING
	BATHROOM FLOOR TILE	\$ -	WITH FLOORING
	SEALED FLOORING (Janitor, Storage, Mech rooms)	\$ -	WITH FLOORING
	ART CLASSROOM FLOOR TILE	\$ -	WITH FLOORING
	VESTIBULE/LOBBY TILE FLOOR	\$ -	WITH FLOORING
	FLOORING & BASE ALLOWANCE	\$ 133,072.00	
	WALL COVERINGS	\$ -	WITH PAINTING
	PAINTINGS AND COATING	\$ 77,578.00	
D-10	VISUAL DISPLAY BOARDS (MISC CLASSROOM ACCESSORIES)	\$ 19,209.00	
	INTERIOR SIGNAGE	\$ -	WITH EXTERIOR SIGNAGE
	EXTERIOR SIGNAGE (ON BUILDING AND MONUMENT MODIFICATIONS)	\$ 22,006.00	
	SPECIALTIES (toilet and bath accessories)	\$ 27,857.00	
	FOLDING PANEL PARTITIONS	\$ -	NA
	FIRE EXTINGUISHERS/KNOX BOX	\$ 4,281.00	
	FLAG POLES (EXISTING)	\$ -	EXISTING
D-11	FOOD SERVICE EQUIP	\$ -	NA
	2 BASKETBALL GOALS	\$ -	NA
	LOCKERS	\$ -	NA
D-12	HORIZONTAL LOUVER BLINDS	\$ 14,154.00	
	ENTRANCE FLOOR MATS	\$ -	NA
	MISC AMENITIES (BENCHES, BIKE RACKS, TRASH, ETC)	\$ 3,000.00	ALLOWANCE
D-21	FIRE SUPPRESSION SYSTEMS (RECONFIGURE HEADS)	\$ 29,500.00	
D-23	HVAC/PLUMBING	\$ 348,075.00	
	TESTING AND BALANCE	\$ -	WITH MECHANICAL
D-26	ELECTRICAL	\$ 302,833.00	
	ACCESS CONTROL FOR GATE	\$ -	???
	FIRE ALARM	\$ 20,685.00	
D-31	LANDSCAPING & IRRIGATION (repair work)	\$ 5,000.00	ALLOWANCE
	STRIPING & SIGNAGE FOR PARKING & DRIVE LANES	\$ 4,324.00	
	DEMOLITION (ALL INTERIOR AS SHOWN)	\$ 201,396.00	PER PRELIM APPROVAL
	COLUMN TOTALS	\$ 1,599,025.00	
	TAX ON MATERIALS	EXEMPT	
	SUBTOTAL (COST OF WORK)	\$ -	
	BOND PERF	\$ 15,190.74	
	BUILDERS RISK	\$ 379.00	
	CONTRACTOR FIXED COSTS		
	PRE CONSTRUCTION		
	STAFF	\$ 130,406.00	
	GENERAL REQUIREMENTS	\$ 61,416.00	
	RECOMMENDED CONTINGENCIES		
	OVERTIME/ACCELERATION CONTINGENCY	\$ -	Pending Permits
	CM CONTINGENCY 3.00%	\$ 47,970.75	
	OWNER CONTINGENCY 3.00%	\$ 47,970.75	
	CITY, COUNTY, UTILITY FEES		
	BUILDING PERMITS 0.50%	\$ -	BY OWNER
	PROFIT/OVERHEAD @ 4.50%	\$ 85,606.12	
	ALLOWANCE FOR ADDITIONAL ITEMS PER BRW (roof drainage & steel support)	\$ 10,000.00	
	<b>TOTAL BUDGET</b>	<b>\$ 1,997,964</b>	

EXCLUSIONS

- MOLD REMEDIATION EXCLUDED
- LOW VOLTAGE EXCLUDED (ROUGH IN INCLUDED)
- EMERGENCY RESPONDER RADIO COVERAGE EXCLUDED
- SECURITY EXCLUDED (ROUGH IN INCLUDED)
- INTERCOM EXCLUDED (ROUGH IN INCLUDED)
- ACCESS CONTROL EXCLUDED
- ANY ELEVATOR MODIFICATIONS/UPGRADES EXCLUDED