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**PART ONE: ORGANIZATION/BUSINESS**

# Facilities

## **Operating and Maintaining School Facilities and Grounds**

School facility operations and maintenance exist to support the primary purpose of K-12 education: quality learning. The core responsibility is to ensure that through the provision of quality custodial and maintenance services- administrators, teachers, and students have an environment that is safe, healthy, and responsive to educational programming. A comprehensive facility custodial and maintenance program is a school district’s foremost tool for protecting its investment in school facilities. Moreover, preventive maintenance is the cornerstone of any effective maintenance initiative.

School facility operations services include the day-to-day running of the school facilities. These services include but are not limited to: energy management, HVAC, cleaning, inspections, opening and closing school; boiler operation; responding the daily emergencies; mowing grass; and generating work requests to maintenance.

School plant maintenance provides for the repair, replacement and renewal of failed infrastructure elements. There is no one way to maintain schools – they are a gamut of size, age, structural systems, etc. A well-designed facility management system generally encompasses four categories of maintenance: emergency (or response) maintenance, routine maintenance, preventive maintenance, and predictive maintenance. The one everyone dreads is *emergency maintenance* (the air conditioner fails on the warmest day of the year or the main water line breaks and floods the lunchroom). When the pencil sharpener in Room 12 finally needs to be replaced, it is *routine maintenance*. *Preventive maintenance* is the scheduled maintenance of a piece of equipment (such as the replacement of air conditioner filters every 10 weeks or the semiannual inspection of the water fountains). Finally, the cutting edge of facility management is now *predictive maintenance*, which uses sophisticated computer software to forecast the failure of equipment based on age, user demand, and performance measures.

A good maintenance program is built on a foundation of preventive maintenance. It begins with an audit of the buildings, grounds, and equipment. When planning preventive maintenance, decision-makers should consider how to most efficiently schedule the work— i.e., concurrently with academic breaks or other planned work. For example, preventive maintenance work such as boiler pipe replacements can be conducted while the boiler is out of commission for routine maintenance (such as when cleaning the scale and mud from inside the boiler or cleaning the manhole and handhold plates). Whereas emergency events demand immediate attention whenever they occur, preventive maintenance activities can be scheduled at a convenient time. Because a rigorous preventive maintenance system results in fewer emergency events, it tends to reduce disruptions to the school schedule.

## **Access Control**

Access to school buildings and grounds will be established by the CEO in accordance with the following:

Unlimited access - the CEO, the executive directors, and the maintenance supervisor.

Limited access - building school leaders, assistant school leaders, and custodians to their assigned buildings, and extracurricular sponsors, counselors, and supervisors for their respective areas or activities.

Possession of keys shall be in accordance with the attached [School Key Policy](#_School_Key_Policy).

### School Key Policy

The primary focus of the teachers and administrators is to prepare students for tomorrow. The establishment of a safe environment in which the students can reach this goal is the shared responsibility of the School administrators and its teachers. Teachers and administrators receive keys to the School. These recipients are entrusted with keys to the School to carry out the education objectives of the School. Because possession of a school key gives authorized persons unfettered access to the School grounds, to the students, and to sensitive records, all parties in possession of a key must keep the goals of confidentiality and safety in mind at all times. In furtherance of these goals, the following School Key Policy which must be followed by anyone who is an authorized key holder:

* Only authorized persons are allowed to be in possession of a key to the School. Authorized persons are only those persons with documentation of authority to possess or control a key. Authorization is specific to each key issued.
* No person may give his or her key to an unauthorized user for **any** period of time. Any key(s) found to be in the possession of an unauthorized person will be confiscated and any person found to have provided a key or a copy of a key to an unauthorized user may be disciplined up to and including termination.
* Unauthorized duplication of a key is strictly prohibited. No person may duplicate a key or request the duplication of a key without express, written permission.
* Lost or stolen keys must be reported to the School leader immediately. A lost key may require one or more buildings to be rekeyed. This process may cost a substantial amount of money. Where permitted by applicable laws, the School may withhold the cost of rekeying the building(s) from a teacher’s or administrator’s check or final paycheck if a violation of this policy resulted in the lost or stolen key.
* Key holders agree to refrain from compromising the security of the campus or a building. Key holders are required to report to the School leader any doors that are unsecured or in violation of the School’s policies.
* Employees must return to the School leader immediately upon request all keys assigned to them or that are in their possession or control in the event of termination of employment, resignation, or layoff.
* Violation of these requirements may result in the loss of key privileges and may result in discipline up to and including termination.

**By signing this form, I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, agree that I have read and that I understand the entire Key Policy. I further agree to the terms and conditions set forth in this policy. I acknowledge that I received the following key(s): Key Number(s): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_. I agree to abide by the Key Policy with regard to this key and all School keys in my possession.**

Printed Name: Signature:

Date: School:

### School Key Responsibility Form

I acknowledge that I have received the key(s) listed below. I understand that it is my complete responsibility to keep this key in a safe place that will not allow access by students, unauthorized staff or any individual not directly associated with the school. I also understand that under no circumstances am I to duplicate this key.

I am aware that if I lose this key, it is my responsibility to immediately report to the Principal or Operations Manager that the key has been lost and to report the last location and time when I had it in my possession. I also understand that I may be charged for a replacement key.

I understand that once my employment ends with the school, it is my responsibility to return this key immediately and that until I do so, the school may withhold my paycheck. I understand that failure to return the key may result in significant penalties.

Please list each key that was issued below in terms of the doors that it will open. (e.g., Master, Exterior Doors, Gymnasium, Cafeteria, Etc.)

**Key 1\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Key 2\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Key 3\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Staff Name (Print):

Date Issued:   
  
  
Staff Signature: SOM Initials:   
  
  
Date Returned:

Staff Signature: SOM Initials:

## **Business Partnership Agreement**

**Business Partnership in Education Activities Agreement**

(school name) and (business name) enter into this Business/School Partnership beginning MO Date Yr. The length of the partnership is one academic year (September-May), at which the relationship will be evaluated by both parties and further plans, made based on these evaluations. Above partners will participate in the following activities.

* Miscellaneous business partnership activities
* Work based learning experience
* Curriculum planning and input
* Other (please specify)

ROLE OF THE SCHOOL

* Share school profile with the business (enrollment data, school improvement goals, etc…)
* Determine school needs with which the business can help, and school resources the business can access.
* Arrange an assembly or other activity to announce the new partnership.
* Keep records of partnership activities and maintain contact with the Business Partnership Coordinator
* Generate publicity for the program and for your partner within the school and community.
* Maintain responsibilities for “thank you” letters and notes, and appreciation activities.

ROLE OF THE BUSINESS

* Designate an employee to coordinate the business participation and maintain contact with school.
* Promote the partnership within the business through presentations to staff, requests for input, letters in paychecks, etc…
* Seek publicly for the program.
* Evaluate partnership and keep records of time, money, human resources, etc.
* Contribute to annual grant and monthly donation projects
* Participate in school projects as needed
* Maintain active involvements in literacy campaign with school

Terms of this agreement include: The partnership may be terminated at any time by one or both parties, so long as the Business Partnership coordinates and Advance Baton Rouge is notified; planning meetings are to occur on as-needed basis.

I have read and agree to the above:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

School Principal Phone

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Contact Phone

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

School Operations Mgr. Phone

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Business Partnership Coordinator Phone

## **Bulletin Board Display Policy**

Prior to creating bulletin board displays, teachers must return a signed copy of this form to acknowledge the receipt of these rules to the School Operations Manager.

Regulations:

1. Size of exhibits is limited to the space available.
2. Exhibits will not be accepted that violate rights guaranteed by the United States Constitution or violate any school policies. This will be determined by the school Leader.
3. The school Leader has final approval of all displays.
4. All displays must promote the school’s values and positively affect the education of the students.
5. In the event of a complaint about the content of an exhibit, bulletin board item or display or the policy in general, complaints should be brought first to the attention of the school Leader. The school Leader’s decision is final.

Printed Name: Signature:

Date: School:

## **Confidentiality Agreement**

Effective as of \_\_\_\_ \_\_\_, \_\_\_\_\_ **[ ]** ("SCHOOL") and  **\_\_\_\_\_\_\_\_** ("\_\_\_\_\_\_\_\_\_") hereby agree as follows:

1. SCHOOL and \_\_\_\_\_\_\_ have determined that it is necessary and desirable that they exchange certain Confidential Information between them.

2. As used herein, the term "Confidential Information" means any and all Confidential Information which is disclosed by either party to the other in writing marked "CONFIDENTIAL" or, if first disclosed orally or by observation, is identified at the time of disclosure as being confidential and so confirmed in writing within thirty (30) days from the date of disclosure.

3. The recipient of Confidential Information agrees not to disclose such Confidential Information to any third party and to use at least the same level of care as it exercises with respect to its own Confidential Information, but not less than a reasonable degree of care, to prevent the disclosure of the Confidential Information to any third party.

4. The mutual obligations of confidentiality as set forth in Paragraph 3 above shall terminate with respect to any particular portion of Confidential Information when the recipient thereof can document that:

1. it was in the public domain at the time of disclosure hereunder;
2. it entered the public domain, through no fault of the recipient, after disclosure hereunder;
3. it was already in the recipient's possession free of any obligation of confidentiality at the time of disclosure and was not previously acquired directly or indirectly from the party disclosing the same hereunder;
4. it was developed by employees of the recipient independently and without reference to any Confidential Information obtained hereunder; or
5. it was disclosed to the recipient without any confidentiality restriction by a third party having the bona fide right to make such disclosure.

5. Notwithstanding the foregoing, recipient may disclose Confidential Information if it is the subject of a subpoena or demand for production of documents in connection with any suit, arbitration proceeding, administrative procedure or before any governmental agency. In such event, recipient shall promptly notify the disclosing party and shall cooperate with the disclosing party in its attempts to protect the confidentiality of the Confidential Information such as by seeking a protective order from a court of competent jurisdiction.

6. All materials including, without limitation, documents, drawings, models, apparatus, samples, sketches, designs, and lists furnished to either party by the other and which contain or embody Confidential Information shall remain the property of the disclosing party and shall be returned to the disclosing party promptly at its request with all copies made thereof, provided that SCHOOL and \_\_\_\_\_\_\_\_ may keep one copy in a safe for archival purposes.

7. Except for the mutual obligations of confidentiality as set forth in paragraph 3 above, this Agreement does not create any other obligation or confer any license or other right on either party with respect to any intellectual-property asset of the other party.

8. Each of SCHOOL and \_\_\_\_\_\_\_ agrees not to export, directly or indirectly, any technical data acquired from the other under this Agreement, or any products made utilizing any such data, to any country for which the U.S. Government or any agency thereof at the time of export requires an export license or other governmental approval, without first obtaining such license or approval.

9. This Agreement shall be construed and enforced in accordance with the laws of the State of \_\_\_\_\_\_\_\_\_ without regard to its conflicts-of-law provisions.

10. In addition to all of the remedies otherwise available to a disclosing party, including, but not limited to, recovery of damages incurred in the enforcement of this Agreement, a disclosing party shall have the right to injunctive relief to restrain and enjoin any actual or threatened breach of the provisions of this Agreement. All of a disclosing party’s remedies for breach of this Agreement shall be cumulative and the pursuit of one remedy shall not be deemed to exclude any other remedies. A receiving party acknowledges and agrees that a disclosing party’s rights under this Agreement are special and unique and that any violation of this Agreement by a receiving party would not be adequately compensated by money damages alone. Upon termination or breach of this Agreement all copies Software and all copies of the Documentation shall be returned to a disclosing party within 5 business days. A receiving party agrees that this obligation to return all copies of the Software and the documentation therefor shall be enforceable by a mandatory injunction entered without any bond.

**IN WITNESS WHEREOF,** SCHOOL and \_\_\_\_\_\_\_ have caused this Agreement to be executed in duplicate by their respective, duly authorized officers in the spaces provided below.

[School Organization]

By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­ Print: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­ Title: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­\_\_

## **Conflict of Interest Policy**

\* State laws or specific authorizers may have their own conflict of interest policies or guidelines.

**Article I Purpose**

The purpose of the conflict of interest policy is to protect (the "Organization")’s interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of an officer or director of the Organization or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

**Article II Definitions**

**1. Interested Person**

Any director, principal officer, or member of a committee with governing board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

**2. Financial Interest**

A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:

**a.** An ownership or investment interest, other than de minimis, in any entity with which the Organization has a transaction or arrangement,

**b.** A compensation arrangement with the Organization or with any entity or individual with which the Organization has a transaction or arrangement, or

**c.** A potential ownership or investment interest, other than de minimis, in, or compensation arrangement with, any entity or individual with which the Organization is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

**Article III Procedures**

**1. Duty to Disclose**

In connection with any actual or possible conflict of interest, an interested person must disclose the existence of a financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

**2. Determining Whether a Conflict of Interest Exists**

A financial interest is not necessarily a conflict of interest. A person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists. After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

Notwithstanding anything herein, a conflict of interest shall not exist and no review or action by any governing board or committee shall be necessary for one or more grants in an aggregate amount of Five Thousand Dollars ($5,000) or less in any single calendar year, from the Organization to an organization that is tax exempt under under Section 501(c)(3) of the Internal Revenue Code, where a financial interest as described herein exists.

**3. Procedures for Addressing a Conflict of Interest**

**a.** An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.

**b.** The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

**c.** After exercising due diligence, the governing board or committee shall determine whether the Organization can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

**d.** If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Organization’s best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

4. **Violations of the Conflicts of Interest Policy**

**a.** If the governing board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.

**b.** If, after hearing the member’s response and after making further investigation as warranted by the circumstances, the governing board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

**Article IV Records of Proceedings**

The minutes of the governing board and all committees with board delegated powers shall contain:

**a.** The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board’s or committee’s decision as to whether a conflict of interest in fact existed.

**b.** The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

**Article V Compensation**

**a.** A voting member of the governing board who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member’s compensation.

**b.** A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization for services is precluded from voting on matters pertaining to that member’s compensation.

**c.** A voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Organization, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

**Article VI Annual Statements**

Each director, principal officer and member of a committee with governing board delegated powers shall annually sign a statement which affirms such person:

**a.** Has received a copy of the conflicts of interest policy,

**b.** Has read and understands the policy,

**c.** Has agreed to comply with the policy, and

**d.** Understands the Organization is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

**Article VII Periodic Reviews**

To ensure the Organization operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

**a.** Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm’s length bargaining.

**b.** Whether partnerships, joint ventures, and arrangements with management organizations conform to the Organization’s written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

**Article VIII Use of Outside Experts**

When conducting the periodic reviews as provided for in Article VII, the Organization may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

## **EMO Disengagement Transition Support Services**

|  |  |
| --- | --- |
| **Function** | **Key Transition Issues** |
| Compliance & Accountability | • Transfer all files and documentation related to authorizer accountability and reporting to bond trustee. Ensure all bond-related reports are current and borrower is in good standing. |
| Finance | • Financial reporting system and procedures. • Create budget cycle. • Complete time and effort reporting for current year grants. • Transition grant coding. • EMO to provide assistance for audit after conclusion of school year (recommend holdback). • Notify all vendors. • Reconcile and refunds due incl. taxes. |
| Human Resources | • Contract payout and pre-existing claims from prior year(s). • Agree bonus accruals. • Benefits negotiation and administration. • New employee handbook. • Transition HRIS. |
| Legal and Risk Management | • Notify insurance carriers. • Transfer all contracts. • Address outstanding litigation and related documentation. • Negotiate transition agreement. |
| Operations | • Transition all facility, transportation, and foodservice contracts. • Transition all vendors incl. utilities. |
| Payroll | • Transition retirement plans. • Transfer payroll files, templates, personnel history. • Resolve outstanding tax issues. • Map general ledger and payroll accounts. |
| Procurement (for next school year) | • Create new purchasing policies and procedures, incl. petty cash and credit card policy. |
| Technology | • Identify assets to be transferred and negotiate price. • Transition of student information system, scheduling, and IEP information. • Transfer inventory and allowable software rights. • Remove EMO applications (e.g., DNS, PERL) and transfer passwords to school. Remove web references. • Set-up email and directories. • Disconnect EMO T-1 and establish new connection, filtering, etc. • Ensure e-rate continuity and tech plan transition. • Transition phone service. • EMO to update and transfer historical gradebook information. • Library management system. • Formative assessment systems including data extract of historical information. |

## **Cleaning Procedures**

### Auditorium Cleaning and Care

This consists of all cleaning associated with the auditorium area such as: stage, prop room, dressing room, orchestra pit, ticket booth, and seating areas, including proper care of floor surfaces, carpeting, and auditorium equipment.

**AUDITORIUM CLEANING AND CARE FORM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **DUTIES** | **Daily** | **Weekly** | **Monthly** | **Annually** | **As Required** |
| Sweep/vacuum aisles |  |  |  |  |  |
| Sweep/vacuum floor areas |  |  |  |  |  |
| Clean/vacuum upholstered seats |  |  |  |  |  |
| Clean stage |  |  |  |  |  |
| Clean orchestra pit |  |  |  |  |  |
| Clean dressing rooms |  |  |  |  |  |
| Clean restrooms |  |  |  |  |  |
| Empty waste receptacles |  |  |  |  |  |
| Replace light bulbs/tubes |  |  |  |  |  |
| Clean prop room |  |  |  |  |  |
| Dust walls |  |  |  |  |  |
| Wash walls |  |  |  |  |  |
| Wash doors and door frames |  |  |  |  |  |
| Remove graffiti |  |  |  |  |  |
| Clean ticket booth |  |  |  |  |  |
| Wet mop hard surface floors |  |  |  |  |  |
| Remove chewing gum, tar, etc. |  |  |  |  |  |
| Spot clean upholstery & carpet |  |  |  |  |  |
| Shampoo/extract carpet |  |  |  |  |  |
| Hard surface floor maintenance |  |  |  |  |  |

### 

### Classroom Cleaning and Care

This will include emptying pencil sharpeners and wastebaskets; cleaning chalkboards and chalk trays; damp wiping or dusting of desks, tables, cabinets, and other specified surfaces; cleaning student cloak closets, sinks, and toilets in assigned work areas; sweeping/dry mopping and wet mopping of floors; vacuuming carpets; washing windows; adjusting venetian blinds and drapes uniformly.

**CLASSROOM CLEANING AND CARE FORM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **DUTIES** | **Daily** | **Weekly** | **Monthly** | **Annually** | **As Required** |
| Dust mop floor |  |  |  |  |  |
| Empty pencil sharpeners |  |  |  |  |  |
| Empty wastebaskets |  |  |  |  |  |
| Secure windows |  |  |  |  |  |
| Adjust blinds/drapes uniformly |  |  |  |  |  |
| Wash sink & fittings |  |  |  |  |  |
| Wash windows & window sills |  |  |  |  |  |
| Dust window sills |  |  |  |  |  |
| Wash wood work & trim |  |  |  |  |  |
| Wash doors & frames |  |  |  |  |  |
| Wash baseboards |  |  |  |  |  |
| Wash furniture |  |  |  |  |  |
| Wash lights & fixtures |  |  |  |  |  |
| Clean chalkboards & trays |  |  |  |  |  |
| Clean venetian blinds |  |  |  |  |  |
| Dust walls & ceiling corners |  |  |  |  |  |
| Vacuum carpet/rugs |  |  |  |  |  |
| Dust wipe clock, TV, etc. |  |  |  |  |  |
| Replace light tubes |  |  |  |  |  |
| Wet mop and/or spray buff floor |  |  |  |  |  |
| Scrub/strip & refinish floor |  |  |  |  |  |

### 

### Corridors and Entrance Care

This will include all cleaning in corridors and lobby entrances; removing all loose paper, trash and rubbish; removing gum and heel marks from the floors; cleaning drinking fountains and glass surfaces in the areas; mopping up wet spots due to weather, leaks or spills; keeping walk-off mats clean; and proper care and maintenance of equipment and materials used. When floors are wet or slippery, keep warning signs in place.

**CORRIDORS AND ENTRANCE CARE FORM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **DUTIES** | **Daily** | **Weekly** | **Monthly** | **Annually** | **As Required** |
| Dust mop floors & steps |  |  |  |  |  |
| Secure windows & doors |  |  |  |  |  |
| Wash fountains & fittings |  |  |  |  |  |
| Wash windows & sills |  |  |  |  |  |
| Wash doors, frames & glass |  |  |  |  |  |
| Wash entrance doors & glass |  |  |  |  |  |
| Wash lockers |  |  |  |  |  |
| Wash woodwork & trim |  |  |  |  |  |
| Wash lights & fixtures |  |  |  |  |  |
| Wash steps & handrails |  |  |  |  |  |
| Dust walls & ceiling corners |  |  |  |  |  |
| Dust off tops of lockers, exit lights & clocks |  |  |  |  |  |
| Damp wipe walls |  |  |  |  |  |
| Clean exhibit cases & art work |  |  |  |  |  |
| Clean/vacuum walk-off mats/other carpeted areas |  |  |  |  |  |
| Clean/shampoo carpeted areas |  |  |  |  |  |
| Spot/wet mop floors |  |  |  |  |  |
| Spray buff floors |  |  |  |  |  |
| Scrub or strip floors |  |  |  |  |  |
| Refinish floors |  |  |  |  |  |

### 

### Gymnasium Care

Includes all cleaning associated with the gymnasium such as; dust mopping before and after athletic events; spot mopping for spills as necessary; cleaning and emptying waste receptacles; washing walls, doors, door frames, and windows; cleaning trash and debris from under and around the bleachers; and replacing light bulbs/tubes as necessary.

**GYMNASIUM CARE FORM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **DUTIES** | **Daily** | **Weekly** | **Monthly** | **Annually** | **As Required** |
| Dust mop floor |  |  |  |  |  |
| Spot mop floors |  |  |  |  |  |
| Dust walls and bleachers |  |  |  |  |  |
| Wash walls and bleachers |  |  |  |  |  |
| Wash doors and door frames |  |  |  |  |  |
| Wash door glass |  |  |  |  |  |
| Empty trash receptacles |  |  |  |  |  |
| Clean under bleachers |  |  |  |  |  |
| Check bleacher operation |  |  |  |  |  |
| Perform bleacher safety checks |  |  |  |  |  |
| Check partition operators |  |  |  |  |  |
| Check backboard operators |  |  |  |  |  |
| Check volleyball pole anchors |  |  |  |  |  |
| Replace burned out light bulbs |  |  |  |  |  |
| Remove gum/tar from floor |  |  |  |  |  |
| Remove graffiti |  |  |  |  |  |
| Wash windows |  |  |  |  |  |
| Wash light fixtures |  |  |  |  |  |
| Secure windows and doors |  |  |  |  |  |
| Do regular floor maintenance |  |  |  |  |  |

### 

### Health Room Cleaning

The health room is one of the most critical areas in our buildings where regular and proper cleaning is important. Health rooms are occupied by students that have cuts, scrapes, contagious infections, and illnesses. Proper cleaning daily is best to control bacteria and odors in the health rooms. Equipment needed for proper cleaning is just as important. Only use the wet mops and bowl swabs labeled for use in the health room restrooms.

**HEALTH ROOM CLEANING FORM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **DUTIES** | **Daily** | **Weekly** | **Monthly** | **Annually** | **As Required** |
| Wash sinks/basins & fittings |  |  |  |  |  |
| Wash urinals & fittings |  |  |  |  |  |
| Wash commodes including seats |  |  |  |  |  |
| Wash windows |  |  |  |  |  |
| Wash walls & ceiling |  |  |  |  |  |
| Wash lights & fixtures |  |  |  |  |  |
| Damp wipe partitions & walls |  |  |  |  |  |
| Polish metal work |  |  |  |  |  |
| Clean mirrors |  |  |  |  |  |
| Empty waste receptacles |  |  |  |  |  |
| Clean soap dispensers |  |  |  |  |  |
| Fill toilet tissue dispenser |  |  |  |  |  |
| Fill paper towel dispenser |  |  |  |  |  |
| Fill sanitary napkin dispenser |  |  |  |  |  |
| Fill soap dispenser |  |  |  |  |  |
| Wet mop floor using germicidal disinfectant cleaner |  |  |  |  |  |
| Secure windows. |  |  |  |  |  |
| Replace light bulbs |  |  |  |  |  |
| Do regular floor maintenance |  |  |  |  |  |
| Strip and refinish floors |  |  |  |  |  |

### Kitchen and Cafeteria Cleaning and Maintenance

This will include removing trash/garbage from the kitchen and dining areas; washing and sanitizing trash/garbage containers; washing overhead hoods, ducts, pipes, and filters; cleaning refrigerator/walk-in box floors; washing walls, windows, doors, and door frames; wet mopping the kitchen and dining area floors with a germicidal disinfectant cleaner; setting up tables before lunch; putting tables away after lunch; and the proper care and maintenance of the cleaning equipment.

**KITCHEN AND CAFETERIA CLEANING AND MAINTENANCE FORM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **DUTIES** | **Daily** | **Weekly** | **Monthly** | **Annually** | **As Required** |
| Wash hoods, filters, ducts, etc. |  |  |  |  |  |
| Wash trash/garbage cans |  |  |  |  |  |
| Wash door sills |  |  |  |  |  |
| Wash doors & door frames |  |  |  |  |  |
| Wash windows & sills |  |  |  |  |  |
| Wash walls, woodwork & trim |  |  |  |  |  |
| Wash lights & fixtures |  |  |  |  |  |
| Clean venetian blinds |  |  |  |  |  |
| Clean ventilating fans |  |  |  |  |  |
| Clean grease traps |  |  |  |  |  |
| Dispose of trash/garbage |  |  |  |  |  |
| Sweep cafeteria floor |  |  |  |  |  |
| Wet mop cafeteria floor |  |  |  |  |  |
| Wet mop kitchen floor |  |  |  |  |  |
| Spot mop floors - due to spills |  |  |  |  |  |
| Clean drinking fountains |  |  |  |  |  |
| Replace light tubes |  |  |  |  |  |
| Secure windows & doors |  |  |  |  |  |
| Spray buff cafeteria floor |  |  |  |  |  |
| Do regular floor maintenance |  |  |  |  |  |

### Restroom Cleaning

The restroom is one of the most critical areas in our buildings where regular and proper cleaning is important. Restrooms that are dirty and have offensive odors cause germs and diseases that pose a threat to good health. Proper cleaning daily is the best way to control bacteria and odors in the restrooms.

Equipment needed for proper cleaning is just as important. The equipment used for the restroom should not be used elsewhere. If possible, mark mops, brooms, and bowl swabs to identify them just for the restrooms so no one else will use them in other areas. The items needed to clean a restroom are: rubber gloves, wet floor sign, broom, dust pan, wet mop, mop bucket and wringer, spray bottles, sponges, putty knife, bowl brush, bowl swabs, germicidal disinfectant cleaner, cream cleanser, hand soap, glass cleaner, hand towels, toilet tissue, sanitary napkins, and disposable sanitary napkin bags.

Safety precautions should always be used to prevent accidents and injuries to self and others.

**First:** Use wet floor signs. These let others know that the janitor is working in the restroom and that the floor is wet.

**Second:** Wear rubber gloves. This will prevent contact of bacteria and germs to hands.

**Third:** The only chemicals used are germicidal disinfectant cleaner, window cleaner, extractor chemical, and stripper. **Do not mix any cleaning chemicals together under any circumstances.**

**Fourth:** Report all necessary repairs of lights, plumbing, or fixtures, and put up an out-of-order sign.

**RESTROOM CLEANING FORM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **DUTIES** | **Daily** | **Weekly** | **Monthly** | **Annually** | **As Required** |
| Wash sinks/basins & fittings |  |  |  |  |  |
| Wash urinals & fittings |  |  |  |  |  |
| Wash commodes including seats |  |  |  |  |  |
| Wash windows |  |  |  |  |  |
| Wash walls & ceiling |  |  |  |  |  |
| Wash lights & fixtures |  |  |  |  |  |
| Damp wipe partitions & walls |  |  |  |  |  |
| Polish metal work |  |  |  |  |  |
| Clean mirrors |  |  |  |  |  |
| Empty waste receptacles |  |  |  |  |  |
| Clean soap dispensers |  |  |  |  |  |
| Fill toilet tissue dispenser |  |  |  |  |  |
| Fill paper towel dispenser |  |  |  |  |  |
| Fill sanitary napkin dispenser |  |  |  |  |  |
| Fill soap dispenser |  |  |  |  |  |
| Wet mop floor |  |  |  |  |  |
| Secure windows |  |  |  |  |  |
| Replace light bulbs |  |  |  |  |  |
| Do regular floor maintenance |  |  |  |  |  |

### 

### Shower and Locker Room Care

This will include all cleaning in shower and locker rooms such as: emptying all waste receptacles; servicing sanitary napkin dispensers, if provided; dusting ledges, grills, and locker tops; cleaning of walls, mirrors, shelves, windows and window sills, stall partitions and doors, wash basins, commodes and urinals; polishing metal work; and sweeping, mopping, and scrubbing of floors.

**SHOWER AND LOCKER ROOM CARE FORM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **DUTIES** | **Daily** | **Weekly** | **Monthly** | **Annually** | **As Required** |
| Empty waste receptacles |  |  |  |  |  |
| Sweep locker/shower room |  |  |  |  |  |
| Wet mop and disinfect locker room area |  |  |  |  |  |
| Wet mop and disinfect shower room area |  |  |  |  |  |
| Clean metal work |  |  |  |  |  |
| Clean locker tops |  |  |  |  |  |
| Fill paper towel dispensers |  |  |  |  |  |
| Fill toilet tissue dispensers |  |  |  |  |  |
| Fill soap dispensers |  |  |  |  |  |
| Fill sanitary napkin dispenser |  |  |  |  |  |
| Wash and disinfect walls and shower stalls |  |  |  |  |  |
| Wash and disinfect stall partitions |  |  |  |  |  |
| Wash and disinfect sinks/basins |  |  |  |  |  |
| Wash and disinfect commodes |  |  |  |  |  |
| Wash and disinfect urinals |  |  |  |  |  |
| Wash mirrors |  |  |  |  |  |
| Wash and disinfect shelves |  |  |  |  |  |
| Wash and disinfect doors |  |  |  |  |  |
| Replace light bulbs |  |  |  |  |  |
| Do regular floor maintenance |  |  |  |  |  |

### 

### Stairs and Stairwells

This will include the wet and dry cleaning in stairwells; i.e., steps, landings, windows, sills, doors, glass, stair treads, risers, lights and fixtures, and handrails.

**STAIRS AND STAIRWELLS FORM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **DUTIES** | **Daily** | **Weekly** | **Monthly** | **Annually** | **As Required** |
| Dust mop steps & landings |  |  |  |  |  |
| Secure windows & blinds |  |  |  |  |  |
| Wash windows & sills |  |  |  |  |  |
| Wash doors, frames, and glass |  |  |  |  |  |
| Wash stair treads |  |  |  |  |  |
| Wash stair risers |  |  |  |  |  |
| Wash lights & fixtures walls |  |  |  |  |  |
| Damp wipe handrails |  |  |  |  |  |
| Damp wipe walls |  |  |  |  |  |
| Damp wipe exit lights |  |  |  |  |  |
| Dust walls & ceiling corners |  |  |  |  |  |
| Replace light tubes/bulbs |  |  |  |  |  |
| Remove chewing gum |  |  |  |  |  |
| Remove graffiti |  |  |  |  |  |
| Wet mop landings |  |  |  |  |  |
| Scrub or strip landings |  |  |  |  |  |
| Refinish landings |  |  |  |  |  |

### 

### Weight Lifting/Exercise Room

This will include all cleaning in weight lifting rooms such as: emptying all waste receptacles and cleaning windows, dust ledges, furniture, walls, disinfect telephone, equipment, and floors.

**WEIGHT LIFTING/EXERCISE ROOM FORM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **DUTIES** | **Daily** | **Weekly** | **Monthly** | **Annually** | **As Required** |
| Dust or vacuum floor |  |  |  |  |  |
| Empty wastebasket |  |  |  |  |  |
| Secure windows |  |  |  |  |  |
| Adjust blinds/drapes uniformly |  |  |  |  |  |
| Clean & disinfect body contact areas of equipment |  |  |  |  |  |
| Wash windows & window sills |  |  |  |  |  |
| Dust window sills |  |  |  |  |  |
| Wash woodwork & trim |  |  |  |  |  |
| Wash baseboard |  |  |  |  |  |
| Wash furniture |  |  |  |  |  |
| Wash lights & fixtures |  |  |  |  |  |
| Dust walls & ceiling corners |  |  |  |  |  |
| Vacuum carpet/rugs |  |  |  |  |  |
| Dust & wipe clock, TV, etc. |  |  |  |  |  |
| Replace light tubes |  |  |  |  |  |
| Wet mop floor |  |  |  |  |  |

### 

### Playground Equipment

Playground equipment should be inspected semi-annually—before school begins and in the early spring. Inspections are important to determine faulty equipment to eliminate risk of injury to students and other community users. Following preventative maintenance inspections and detailed record keeping will aid in the reduction of liability issues.

### Playground Inspection Checklist

Playground equipment should be inspected for safety before school starts in the fall. A July inspection allows time for repairs to be made before students return for the first day of school. An early spring inspection (early-March) should also be accomplished. The following checklist should be used for these semi-annual inspections and should be kept with other preventive maintenance records. Minor repairs should be made at the school level. Repairs beyond the capability of in-school personnel should be placed on a “Maintenance Requisition.”

**PLAYGROUND INSPECTION CHECKLIST**

|  |  |  |  |
| --- | --- | --- | --- |
| **Checked** | **Play Equipment** | **State the Repairs Needed** | **What Repairs Were Made** |
| **SLIDES** | | | |
|  | -Exposed concrete footing |  |  |
|  | -Protruding bolts or hardware |  |  |
|  | -Head entrapment areas  (between 3" and 9") |  |  |
|  | -Metal slide bed separating from equipment base at entrance, exit or joints |  |  |
|  | -Loose, bent, sharp, or missing parts |  |  |
|  | -Unstable equipment |  |  |
|  | -Rough or broken slide bed |  |  |
|  | -Finger entrapment areas areas  (between 3/8" and 1") |  |  |
|  | -Rust or dry rot on frame |  |  |
|  | -Peeling paint or graffiti |  |  |
|  | -Obstructions in 8’ fall zone |  |  |
|  | -Rusty/worn hardware |  |  |
|  | -Debris littered steps |  |  |
| **CLIMBERS** | | | |
|  | -Exposed concrete footing |  |  |
|  | -Protruding bolts or hardware |  |  |
|  | -Head entrapment areas (between 3" and 9") |  |  |
|  | -Loose, bent, sharp, or missing parts |  |  |
|  | -Unstable equipment |  |  |
|  | -Peeling paint or graffiti |  |  |
|  | -Finger entrapment areas  (between 3/8" and 1") |  |  |
|  | -Rusty-worn hardware |  |  |
|  | -Rust or dry rot on frame |  |  |
|  | -Loose railings |  |  |
|  | -Obstruction in 8' fall zone |  |  |
| **TENNIS COURTS** | | | |
|  | -Surface cracked or pitted |  |  |
|  | -Concrete Footing of net supports loose |  |  |
|  | -Fixtures broken |  |  |
|  | -Fencing around courts loose, torn or broken |  |  |
|  | -Broken glass or gravel on courts |  |  |
| **FOOTBALL/SOCCER FIELDS** | | | |
|  | -Goals bent or broken |  |  |
|  | -Grounds in poor shape |  |  |
| **BASEBALL/SOFTBALL DIAMONDS** | | | |
|  | -Backstop fencing bent, torn or broken |  |  |
|  | -Glass or rocks scattered on fields |  |  |
|  | -Grounds in need of care  (i.e., ground hog holes, gullied areas, etc.) |  |  |
|  | -Glass, bottles, paper or cans need to be cleaned up |  |  |
| **SWINGS** | | | |
|  | -Loose/worn chain swivels |  |  |
|  | -Badly worn chain links |  |  |
|  | -Seats cracked or broken |  |  |
|  | -Protruding nuts and bolts |  |  |
|  | -Loose concrete footings - unstable equipment |  |  |
|  | -Loose, bent or missing parts |  |  |
|  | -Excessively/dangerously rusted parts |  |  |
| **SEESAWS** | | | |
|  | -Rotted or cracked boards |  |  |
|  | -Protruding or exposed nuts or bolts |  |  |
|  | -Badly worn pivotal joints |  |  |
|  | -Cracked boards or handles |  |  |
|  | -Loose concrete footing |  |  |
| **BASKETBALL COURTS/ HOOPS** | | | |
|  | -Hoops loose/broken |  |  |
|  | -Backstop loose |  |  |
|  | -Surface (concrete or blacktop) cracked, loose or pitted |  |  |
|  | -Surfaces with broken glass or gravel |  |  |
|  | **CRAWL TUNNELS** |  |  |
|  | -Peeling paint |  |  |
|  | -Finger entrapment areas  (between 3/8” and 1”) |  |  |
|  | -Cracked or broken areas |  |  |
|  | -Obstruction in 8’ fall zone |  |  |
|  | -Rough/sharp edges |  |  |
|  | -Glass or debris present |  |  |
| **PLAY AREA SURFACING AND BORDERS** | | | |
|  | -Surfacing border has rough or cracked concrete, rough boards, or protruding bolts or nails |  |  |
|  | -The depth of loose surfacing material is less than 6” |  |  |
|  | -Surfacing border is not adequately containing the material |  |  |
|  | -Glass and/or debris present |  |  |
|  | -Play pieces are not at least 8’ apart |  |  |
| **WOODEN CLMBING EQUIPMENT** | | | |
|  | -Split uprights on wooden equipment |  |  |
|  | -Exposed footings |  |  |
|  | -Uprights worn/loose |  |  |
|  | -Platforms, rungs, railings loose or worn |  |  |
|  | -Loose bolts |  |  |
| **SPRING RIDING TOYS** | | | |
|  | -Concrete footing loose |  |  |
|  | -Exposed bolts and nuts |  |  |
|  | -Plastic structure broken or cracked |  |  |
| Overall comments on playground: | | | |

***Please Note: In no case should the fall height of a child to the cushioned ground surface exceed 7 feet.***

**Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Inspected by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**School \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

## **Custodians**

The Custodian is responsible for keeping assigned buildings clean, safe, functional, and secure in accordance with prescribed codes and established district policies and standards. A custodial worker must maintain all assigned buildings in a state of operational excellence such that they present no interruptions, distractions, or obstacles to the education program.

### 

### Responsibilities: Day Crew

The typical day crew is primarily responsible for the areas of the buildings that are not occupied (or areas that are occupied by staff that can be interrupted briefly during the day).

### Daily (5 days per week)

1. Deactivate alarm system, unlock building and turn on hallway lights (where needed) by 6:30 am.
2. Sweep and blow materials from all doorways by 6:40 am.
3. Raise flag by 6:50 when weather permits.
4. Prepare materials and equipment for custodial activities.
5. Clean entrance mats.
6. Clean and disinfect restrooms and gym dressing rooms at least 3 times per day following the morning break and the lunch break. (Remove graffiti immediately. Wash, clean, and sanitize fixtures including toilets, urinals, sinks, showers, etc. Sweep, damp mop and sanitize floors. Keep drains open.)
7. Clean and disinfect drinking fountains.
8. Pick up trash and debris in yard areas.
9. Empty trash receptacles (inside and outside).
10. Clean the trash dumpster area.
11. Dust mop gymnasium floors after each class, after each practice, and during half-time of games. (PE instructors and coaches may be responsible for this activity in some ABR Schools.)
12. Monitor heating & cooling equipment and report defects to the maintenance department.
13. Perform minor maintenance repairs and periodic preventive maintenance as needed. Report severe maintenance needs to the ABR School leader who will report them to the maintenance department.
14. Perform special custodial services requested by the ABR School leader, maintenance director or CEO as needed. These activities may range from something as simple as unloading materials delivered by delivery services or motor freight or they may involve cleaning up accidental spills, vomit, etc.

### Weekly (once per week)

1. Maintain an adequate inventory of custodial supplies, materials and equipment.
2. Spot clean or scrub VCT and terrazzo floors to remove scuffs and heel marks in hallways, dining area, offices, lounges, etc. Spray buff to maintain a protective coating and attractive sheen.
3. Spot clean carpeted areas and periodically clean thoroughly with an extraction machine.
4. Clean door and window glass.
5. Remove dust from lockers, pipes, heating/cooling devices, door and window casements, lighting fixtures, ceiling fans, etc. in hallways and offices.
6. Perform periodic yard maintenance including trim mowing, edging, cleanup and removal of grass clippings and debris, etc. Shrubbery and trees should be pruned and a clean bed of pine straw should be maintained around shrubbery, flower beds, etc. as needed.

### Responsibilities: Night Crew

The typical night crew is primarily responsible for the areas of the buildings that are occupied by students and faculty during the day such as classrooms, media center, gymnasium, etc. However, they should clearly understand that they are responsible for the ***entire facility*** and they should make certain that all areas are clean and ready for occupancy the next day.

### Daily (5 days per week)

1. Prepare materials and equipment for night crew activities.
2. Empty/clean trash receptacles.
3. Sweep and dust mop VCT or terrazzo floors and vacuum carpeted floors.
4. Dust mop gymnasium floors after each practice and during half-time of games. (Coaches may be responsible for this activity in some ABR Schools.)
5. Spot clean furniture, walls, door and window casements, lighting fixtures, ceiling fans, auditorium seating, etc.
6. Clean chalkboards, trays, etc.
7. Clean and disinfect sanitize restrooms and gym dressing rooms. (Remove graffiti. Wash, clean, disinfects and polishes fixtures including toilets, urinals, sinks, showers, etc. Sweep, damp mop and disinfect floors. Keep drains open.)
8. Adjust blinds consistent with other rooms.
9. Close and lock windows and doors and reset the alarm system before leaving for the night.
10. Perform special custodial, minor maintenance and preventive maintenance services requested by the ABR School leader, maintenance director or CEO as needed.

### Weekly (Once per Week)

1. Maintain an adequate inventory of custodial supplies, materials and equipment.
2. Remove dust from lockers, pipes, heating/cooling devices, door and window casements, lighting fixtures, ceiling fans, etc.
3. Clean door and window glass.
4. Spot clean or scrub VCT and terrazzo floors to remove scuffs and heel marks. Spray buff to maintain a protective coating and attractive sheen.
5. Spot clean carpeted areas and thoroughly clean carpet periodically with an extraction machine.

### Annually (Once per Year)

Major improvements such as painting, remodeling, refinishing floors, etc. should be done during Christmas, Easter, summer and intercession breaks.

### 

### Essential Duties and Responsibilities of Custodians

* Perform regular custodial duties in assigned areas of buildings.
* Accept instructions from head custodian/supervisor verbally or in writing.
* Provide services as necessary to support curricular and extracurricular events and activities.
* Maintain inventory of custodial/maintenance supplies and equipment.
* Restock disposable custodial/maintenance items and provide head custodian/supervisor with inventory usage data.
* Clean and preserve designated spaces, equipment, furniture, etc. in the buildings.
* Assist visiting members of the public who are utilizing the facilities.
* Maintain work related records and prepare work reports as directed.
* Project a positive image for the schools district with his/her team, whenever the public, guests, or visitors are in the building.
* Work closely with the head custodian/supervisor and/or building administrators to be prepared for scheduled evening activities and unscheduled events as needed.
* Maintain building and grounds security by opening/closing the building each school day and during special events as directed.
* Work on call as needed at any time for emergency repairs, equipment monitoring, overtime, or special needs falling outside of normal working hours.
* Identify and schedule work to be performed during school extended school breaks.

### Daily Duties (5 days per week)

* Perform general cleanup—any and all incidents as they arise.
* Inspect entrances and sidewalks for damage, clutter/dirt, malfunction, or other hazards.
* Vacuum all entrance mats, outside mats, and clean sidewalk up to 10 feet from entrance.
* Wet mop inside of entrances if wet or in bad condition.
* Sweep all stairways.
* Machine vacuum all carpeted corridors, walkways, and 10 feet in from doorway of each room.
* Clip all carpet sprigs as necessary.
* Remove all spots from carpet.
* Extract soiled areas on carpets as needed.
* Remove gum from floors.
* Dust mop and sweep corners of all tiled classrooms and adjacent rooms. Wet mop if needed.
* Spot vacuum all classrooms, offices, and other carpeted areas. Pick up any paper left on floor.
* Make sure rooms appear orderly.  
  Empty all trash cans (rinse or wash if needed).
* Put all trash in dumpsters.
* Remove all marks from walls and lockers nightly.
* Replace defective light bulbs as needed.
* Wash all main entrance windows.
* Thoroughly clean all surfaces in restrooms.
* Clean all drinking fountains.
* Lock all doors as directed by the director of facilities/administration or his/her designee and lock all outside doors as soon as daily activities are over.
* Close and lock windows.
* Clean all equipment after use (e.g., mop buckets and custodian’s service sink).
* Hang up brooms, dust mops, and wet mops. Do not stand them against wall.
* Clean and straighten janitor’s closet.
* Keep shelves and supplies in neat order and stocked with supplies.
* Turn in any items or articles found to the Lost and Found Department.
* Check entire area for vandalism and report to the director of facilities/administration or his/her designee.
* Assist other employees with cleanup after large activities (e.g., after a basketball game).

### Weekly Duties (once per week)

* Sweep under all entrance mats (both inside and outside).
* Dust mop and sweep out corners of all the tiled areas that are not covered under daily routines.
* Vacuum all carpets thoroughly in all classrooms and work areas according to schedule.
* Wet mop tiled areas. Wax, if needed.
* Wash all desktops, chairs, and furniture according to schedule.
* Dust everything in rooms and corridors according to schedule.
* Make sure all lockers are dusted and marks removed.
* Wash all hallway door windows.
* Clean cove molding and edges thoroughly.
* Vacuum blackboard erasers.
* Wash all blackboards, chalkboard rails, and marker boards according to schedule.
* Wash display case glass, if needed.
* Check the furniture once a week for breakage and either repair it or report it to the head custodian/supervisor.
* Check all playground equipment for damage or unsafe conditions and inform Plant Service of repair needs.

### Monthly

* Vacuum or clean all intakes and exhaust ventilating louvers in ceiling of every room.
* Clean out all storage rooms.

### Winter and Spring Break

* Light-scrub and re-wax all hard tile floors. Strip, if needed.
* Extract carpeted rooms as needed.
* Extract entrance mats.
* Lightly dust all rooms.
* Wash all desktops.
* Wash inside of all windows.
* Scrub floors and clean all walls and partitions in restrooms.
* Make sure all sinks, urinals, and stools are cleaned (in, under, and around).

### Summer Duties

* Wash all windows inside and out.
* Wash all desks (including teachers’) inside and out.
* Wash all walls as needed.
* Remove all dirt from lights and high-dust everything.
* Wash all doors and frames. Pay special attention around lock assembly.
* Scrub all floors and re-wax, strip if needed.
* Thoroughly vacuum all carpeted areas and extract.
* Completely clean all fixtures, furniture, ceiling, walls and floors.

### Typical Minor Maintenance Duties for Custodians

The list below identifies some of the typical minor maintenance activities that custodians are responsible for:

* Replace defective lamps (lighting fixtures, exit lamps, etc.)
* Repair furniture including desks and chairs, bookcases, cabinets, etc. Replace chair and desk glides. Repair/replace damaged cafeteria tables and seats.
* Replace cove base, ceiling panels, etc.
* Repair simple plumbing leaks in faucets, sinks, etc. Remove minor drain blockages in sinks, water coolers, etc. Replace damaged commode seats.
* Clean restroom exhaust fans. Install/repair paper towel, toilet paper and soap dispensers.
* Install/repair pencil trimmers.
* Hang pictures, maps, projection screens, etc.
* Reset clocks after seasonal time changes and power outages.
* Simple lock and hardware repairs for doors and windows, door closers, etc.
* Simple touchup painting (with prior approval and assistance from the maintenance department).
* Monitor HVAC equipment, thermostats, etc. and reset controls when needed.
* Clean radiators and repair radiator cabinets.
* Clean ceiling fans in classrooms, offices, etc.
* Replace defective HVAC filters.
* Remove and dispose of trash and debris in gutters and on roofs.
* Assist mowing crew by doing the trim mowing, edging and removal of grass clippings and debris.
* Prune shrubs, trees, etc. and spread pine straw or mulch around shrubs, flower beds, etc.
* Repair playground equipment, fences, and other outdoor equipment.
* Preventive maintenance and repair of custodial equipment such as wet and dry vacuum machines, floor machines, lawn mowers, string trimmers, etc.
* Maintain each individual’s set of keys and the key control system and master keys for the facility.

## 

### Custodian Schedule Procedure

Each school should fill a custodian schedule form (below) for each custodian outlining their duties. The form is organized by the time of day. On the form, the School Operations Manager gives the areas of responsibilities for the custodian thereby better organizing the maintenance process. This form is to be reviewed by the custodial staff and orally agreed upon.

**CUSTODIAN SCHEDULE FORM**

|  |  |
| --- | --- |
| **Custodian Schedule Form** | |
| School Name: |  |
| Custodian: |  |
| Start Time: |  |
| End Time: |  |
| Schedule: |  |
| Assigned: |  |
|  |  |
| **Area Responsibilities (Instructions)** | |
|  |  |
| Time: | Responsibility: |
| 6:00 a.m. |  |
| 7:00 a.m. |  |
| 8:00 a.m. |  |
| 9:00 a.m. |  |
| 10:00 a.m. |  |
| 11:00 a.m. |  |
| 12:00 p.m. |  |
| 1:00 p.m. |  |
| 2:00 p.m. |  |
| 3:00 p.m. |  |
| 4:00 p.m. |  |
| 5:00 p.m. |  |
| 6:00 p.m. |  |
| 7:00 p.m. |  |
| Additional Comments: | |

### Custodian Inspection Procedure

The Custodian Inspection Form (below) is used by the Custodial staff. This form allows the custodians to document their regular inspections of the school areas. Each inspected area has a comment area to enable custodians to be very detailed about any concerns. This form is to be filled out and returned to the School Operations Manager immediately after the inspections (after hours please use School Operations Manager’s mailbox).

**Custodian Inspection Form**

School: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Custodian: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Inspected by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­\_\_\_\_

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| AREA INSPECTED | Excellent | Satisfactory | Below  Average | Unsatisfactory | COMMENTS |
| Entrances & Lobby |  |  |  |  |  |
| Offices |  |  |  |  |  |
| Classrooms |  |  |  |  |  |
| Restrooms |  |  |  |  |  |
| Corridors & Stairwells |  |  |  |  |  |
| Lounges |  |  |  |  |  |
| Gymnasium |  |  |  |  |  |
| Locker Rooms |  |  |  |  |  |
| Dining Area |  |  |  |  |  |
| Kitchen |  |  |  |  |  |
| Custodial Closets |  |  |  |  |  |
| Other Storage Areas |  |  |  |  |  |
| Trash Dumpster Area |  |  |  |  |  |
| Grounds, Shrubbery, and Landscaping |  |  |  |  |  |
| Parking Areas |  |  |  |  |  |
| Driveways |  |  |  |  |  |
| Doors, Windows, & Hardware |  |  |  |  |  |
| Structural Components & Roof |  |  |  |  |  |
| Plumbing System, Fixtures, & Equipment |  |  |  |  |  |
| Mechanical Equipment & Controls |  |  |  |  |  |
| Additional Comments: | | | | | |

## **Custodial and Facilities Management Services Request for Proposals (RFP)**

REQUEST FOR PROPOSALS (“RFP”) CUSTODIAL AND FACILITIES MANAGEMENT SERVICES

Interested parties shall respond to this RFP by submitting proposals as soon as possible to:

[ ] [ ] [ ]

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_reserve the right to reject any and all qualification statements, to cancel this solicitation, and to waive any informalities or irregularities in procedure.

Introduction

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_is soliciting proposals from offerors having specific interest and qualifications in the areas identified in this solicitation. Qualification statements and proposals for consideration must contain evidence of the offeror's experience and abilities in the specified area and other disciplines directly related to the proposed work. Other information required by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_includes the submission of profiles and resumes of the staff to be assigned to the projects, references, illustrative examples of similar work performed, and any other requested information which will clearly demonstrate the offeror’s expertise in the area of this solicitation.

A selection committee will review and evaluate all qualification statements and may request offerors to make oral presentations. The selection committee will rely on the qualification statements in selection of finalists and, therefore, offerors should emphasize specific information considered pertinent to this solicitation and submit all information requested.

Project Description

Offeror should be able to provide custodial services, facilities management services, and groundskeeping services.

Sites may include

[ ]

[ ]

Vendors are encouraged to bid for the entire facility program that includes services for all sites, but may also bid for any number of sites including only one. Bids must include custodial, facility and ground maintenance services.

Services may include the following:

(i) Daytime and evening custodial services, including thorough cleaning of designated areas and cleaning procedures on a frequency to be agreed in writing.

(ii) Project work on a scheduled basis, to be agreed in writing.

(iii) Summer cleaning as specified, including deep cleaning of each area.

(iv) Provision of all equipment and supplies required to fulfill custodial responsibilities, and uniforms for staff.

(v) Supply and replenishment of bathroom soap and paper.

(vi) Groundskeeping of entire site, including grasscutting and provision of required equipment.

(vii) Procurement of SchoolDude work order tracking system and management and maintenance of work order system, potential through operation of a call center or help desk.

(viii) Weekly reporting on work order status and measures to reduce backlog, if any.

(ix) Preventative maintenance of equipment. Major capital repairs will be excluded from Services.

(x) 24/7 emergency response availability.

• The form of contract is attached to this RFP. Any exceptions to the attached form of contract should be identified

Qualification Statement Requirements

The offeror shall provide the following information organized as follows in their qualification statement:

A brief discussion of the firm, its organization, and services offered;

Information which demonstrates experience and history of providing said service as identified in this solicitation;

Description of staff training programs; and

Proposed team and qualifications and experience of team members; knowledge and experience of team members with respect to charter school organizations and the project description above.

Proposal Requirements

Offerors shall submit the following in addition to qualifications:

Proposed scope of services.

Proposed fee and fee structure.

Hourly billing rates for assigned team members, if appropriate

Budget hours and cost by day, week, month.

Example certificate of insurance, demonstrating

Timeline

The deadline for submission of proposals is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ . Proposals may be submitted electronically to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_or in hard copy format to the address below:

[ ] [ ] [ ]

Additional Information

For further information regarding this request, please contact \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_email

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_or call \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

## **Facility Audits**

A facility audit (or inventory) is a comprehensive review of a facility’s assets. Facility audits are the standard method for establishing baseline information about the components, policies, and procedures of a new or existing facility. An audit is a way of determining the “status” of the facility at a given time—that is, it provides a snapshot of how the various systems and components are operating. A primary objective of a facility audit is to measure the value of an aging asset relative to the cost of replacing that asset. Thus, facility audits are a tool for projecting future maintenance costs. Facility audits are accomplished by assessing buildings, grounds, and equipment; documenting the findings; and recommending service options to increase efficiency, reduce waste, and save money. Thus, an audit provides the landscape against which all facilities maintenance efforts and planning occur.

A facility audit is a data collection process, pure and simple. It should include data on all facilities, infrastructure, grounds, maintenance staff (e.g., specialized training courses attended), and equipment (including boilers and HVAC systems), floor finishes, plumbing fixtures, electrical distribution systems, heating and air conditioning controls, roof types, flooring, furniture, lighting, ceilings, fire alarms, doors and hardware, windows, technology, parking lots, athletic fields/structures, playground equipment and landscaping, and the building envelope. Other issues to consider during an audit include accessibility (does a facility meet the requirements of the Americans with Disabilities Act, or ADA?), clean air, asbestos, fire, occupant safety, energy efficiency, susceptibility to vandalism, and instructional efficiency (e.g., alignment with state and local classroom standards).

More specifically, building components include, but are not limited to:

* rooms
* interior walls
* interior doors
* floors
* plumbing
* electrical systems
* HVAC systems
* kitchens
* hardware
* egresses
* communication equipment (audio, video, and data)
* exterior envelope (walls and windows)
* roof and roofing materials
* foundations and basements

Grounds include, but are not limited to:

* courtyards
* unimproved fields
* athletic fields
* playgrounds
* parking lots

Equipment includes, but is not limited to:

* fixed equipment (motors, compressors, telephones, computers)
* tools (lawn mowers, snow blowers, leaf blowers, drills)
* vehicle fleets (buses, vans, trucks, cars)
* supplies (motor oil, cleaning agents, pesticides, and other chemicals)

## **Facility Use Request**

### Facility Use Request Form

Top of Form

|  |  |
| --- | --- |
| **FACILITY USE REQUEST FORM** | |
| Date: |  |
| Name of User/Organization: |  |
| **Facility** | |
| Campus 1 |  |
| Campus 2 |  |
| Campus 3 |  |
| Campus 4 |  |
| Campus 5 |  |
| **Area** | |
| Auditorium |  |
| Gymnasium |  |
| Cafeteria |  |
| Kitchen |  |
| Classrooms |  |
| Number |  |
| Other |  |

Bottom of Form

**Proposed Use:**   
Describe the nature of the proposed use, the purpose or objective, and the target population.   
(Please attach a brochure or flyer, if available and appropriate.)

Top of Form



**Period of Requested Use:**   
List the dates, days, and hours of the request. (Please attach a calendar, if available and appropriate.)

|  |  |  |
| --- | --- | --- |
| Dates |  | |
| Days |  | |
| Hours | Start: | End: |

User Signature: Date:   
  
  
Printed Name:

### Facility Use Request Application

|  |  |
| --- | --- |
| **FACILITY USE APPLICATION** | |
| Date: |  |
| Name of User/Organization: |  |
| Address of User/Organization: |  |
| Organization Phone Number: |  |
| Name of Contact: |  |
| Contact Phone Number: |  |
| After-hours Phone Number: |  |
| **Each user or organization is required to provide the following insurance coverages:** | |
| General Liability | $ 2,000,000 |
| Umbrella Coverage | $ 5,000,000 |
| Property/Lease Insurance | 100 % replacement cost |
| **Insurance Information** | |
| Name of Insurance Company: |  |
| Policy Number: |  |
| Name of Insurance Agent: |  |
| Telephone Number: |  |

### Facility Use Request Agreement

**FACILITY USE AGREEMENT**

**SCHOOL NAME**, hereby agrees to provide use of the **GYMNASIUM** to (name of Lessee) (**“LESSEE”**) on \_\_\_\_\_\_\_\_\_\_\_\_\_\_ (date),

from \_\_\_\_\_\_\_\_\_\_ to \_\_\_\_\_\_\_\_ (time). Whereas, **SCHOOL NAME** owns and operates the  **GYMNASIUM** and **LESSEE** desires to rent the same for the term of the lease, upon the following terms and conditions.

NOW THEREFORE, it is agreed as follows:

**BASIC FACILITY CHARGE**The **LESSEE** agrees to pay **SCHOOL NAME** the sum of (lease amount) for the use of **GYMNASIUM** . The Basic Facility Charge shall include, and be limited to, making the Facility available for use in a heated, lighted, and clean condition and shall be paid by (date due) to the (name of payee) .

**CANCELLATION OR CHANGES IN (NAME OF FACILITY) REQUEST**Written notification of cancellation by the **LESSEE** must be received by **SCHOOL NAME** 14 (fourteen) days prior to the scheduled date of the **EVENT**. Notification of cancellation by the **LESSEE** received after 14 days prior to the **EVENT** will result in the **LESSEE** being held liable for the entire Basic Facility Charge and any Special Service Charges. **LESSEE** shall assume financial responsibility for charges generated by errors or omissions of scheduling information on their part. Any changes to the original Facility Request must be submitted 14 days prior to the scheduled date of the **EVENT** and must be in writing and signed by both parties. Should the conduct of the **EVENT** contemplated by **LESSEE** at the **GYMNASIUM** be prohibited or prevented by any laws, proclamations or decrees, or if such conduct is prevented or substantially impeded by an “Act of God”, strikes, labor disturbances, demonstrations, war, riot or other like cause, such game, contest or exposition shall be rescheduled, if practical, for a time mutually agreeable to the parties. Should such **EVENT** not be rescheduled, **LESSEE** shall reimburse **SCHOOL NAME** for its actual expenses incurred in anticipation of and preparation for such **EVENT**.

**TERMINATION**  
In the event of unforeseen occurrences or the failure of any or all of the Signatory(s) to comply with any covenant or term of the Agreement, **SCHOOL NAME** shall have the right to immediately terminate this Agreement by verbal notice to Signatory(s)’s representative.

**DAMAGES**  
The **LESSEE** agrees to indemnify the **SCHOOL NAME** for any damages in excess of ordinary wear to the building, furniture, equipment or other fixtures caused by an act of players, coaches, employees, representatives, or invited or uninvited guests or spectators at the **EVENT**. The **LESSEE** will be billed for any damages repaired by **SCHOOL NAME** including labor and materials. **SCHOOL NAME** does not assume responsibility for damage to or loss of any materials or equipment left in the **GYMNASIUM**, on display, or in storage.

**SPECIAL SERVICE CHARGE-ADDITIONAL BILLING**  
It is agreed that **SCHOOL NAME** may unilaterally undertake to provide the **LESSEE** special janitorial and supervisory coverage including services which are sufficient in its discretion to restore the **GYMNASIUM** to a clean and orderly condition. **LESSEE** shall pay for all services necessary or desirable to properly maintain and operate the **GYMNASIUM** during the term of the lease including, although not limited to, traffic control, ticket selling and taking, ushering, officials, announcers, and such other services as deemed appropriate by the OPERATIONS MANAGER of **SCHOOL NAME**. If the aforesaid services are arranged by **SCHOOL NAME**, then the **LESSEE** will reimburse **SCHOOL NAME** for all costs associated with the service. (date breakdown of additional charges with amounts). The total custodial fees are (amount being charged) .

**SPECIAL REGULATIONS**The **LESSEE** shall not permit players, coaches, employees, representatives, or invited or uninvited guests or spectators to bring onto, or possess on **SCHOOL NAME** premises, animals, pets, weapons, contraband, alcohol, explosives, fireworks or other controlled substances. The **LESSEE** shall provide at least one adult supervisor for each 10 minors participating in an **EVENT**. For the purpose of the agreement, a “minor” is any person under the age of 18 years. The supervisor(s) shall be in charge of the group and shall be responsible for seeing that the terms and conditions of this agreement are met.

**FOOD AND BEVERAGES**

1. **LESSEE** may not sell, serve, or allow to be sold or served, food or beverages or refreshments of any kind in the **GYMNASIUM** except as follows:
   1. Food or beverages purchased from (school name) vending machines may be consumed in designated vending areas; and
   2. **LESSEE** may contract for concessions services as provided by Sections B, below, and pay to **SCHOOL NAME** a concessions license fee of 25% of concessions receipts (net of taxes). **SCHOOL NAME** reserves the right to determine that sale of concessions is not appropriate for a particular **EVENT** at the **GYMNASIUM**, or to limit the sale and consumption of such concessions to designated areas in the **GYMNASIUM**.
   3. If **LESSEE** wishes to contract for concessions services as provided by Section A. (2), above **LESSEE** may choose to contract with **SCHOOL NAME**
      1. If **LESSEE** chooses **SCHOOL NAME** as caterer for the provision of concessions services, it is recommended that **LESSEE** make such arrangements at least FOURTEEN (14) days in advance of the **EVENT**.
      2. Immediately following the **EVENT**, **LESSEE** will reconcile the concessions receipts and pay the 25% concessions license fee to **SCHOOL NAME.** **LESSEE** agrees to maintain complete records pertaining to concession sales, and agrees that **SCHOOL NAME** has the right to audit any such records as it deems necessary.

**MERCHANDISE SALES**

1. Except as otherwise provided herein, **LESSEE** may not sell, or allow to be sold, clothes, souvenirs, or merchandise of any type at the **GYMNASIUM** without the express written approval of **SCHOOL NAME**.
2. Merchandise, including programs, bearing **SCHOOL NAME** marks or the name or picture of **SCHOOL NAME** facilities may only be sold by **LESSEE** pursuant to a written license agreement with the **SCHOOL NAME** Director of Trademark and Licensing, **SCHOOL ADDRESS, SCHOOL CITY, SCHOOL STATE SCHOOL ZIP CODE**
3. Printed programs, if any, shall be provided by **LESSEE** and revenues generated by the sale of such programs may be retained by the **LESSEE**. Said programs may be sold in the **GYMNASIUM** by employees of **LESSEE**. The programs are subject to the restrictions on use of **SCHOOL NAME** facilities as specified in B and C above, and shall not state or imply an endorsement of **LESSEE** or **EVENT** by the **SCHOOL NAME.**

**SPONSORSHIP  
SCHOOL NAME** shall not be deemed to be a sponsor of any activities conducted by **LESSEE** at the **GYMNASIUM** or elsewhere, and no literature or publicity shall indicate **SCHOOL NAME** sponsorship. Use of the **GYMNASIUM** for the purpose of commercial exploitation is prohibited. All posters, banners, etc., will be subject to approval by the **OPERATIONS MANAGER**.

**STATUTES, RULES, AND REGULATIONS**

In the interest of personal safety of guests, students, and staff, the following rules must be followed: a)the **GYMNASIUM** is not to be used in excess of the normal seating capacity (approximately 1250) seats/spectators), b)all aisles leading to exit doors must be kept clear and unobstructed, exit doors must remain unobstructed so that the doors can be opened readily from the inside. **LESSEE** acknowledges that this Agreement is subject to all rules and regulations of the **SCHOOL NAME**. **LESSEE** agrees to conform to those rules and regulations and be bound thereby. **LESSEE** further agrees that is shall conform to, comply with, and abide by all applicable laws of the United States, the State of Louisiana, the rules and regulations of all jurisdictional governmental boards and bureaus, including the regulations of the Fire Department. Failure to comply with this provision will be grounds for termination of the **EVENT**.

**PARKING**Parking in the vicinity of the facility will be in accordance with **SCHOOL NAME** policy. **Guaranteed parking is not part of this contract**, and during **SCHOOL NAME** Special Events a fee may be required and/or parking may be prohibited in lots that surround the **GYMNASIUM.**

**SUBLETTING OF FACILITY SPACE**The **LESSEE** may not sublet their approved allocated date/time.

**SPECIAL FACILITIES AND SERVICES**Certain special facilities may be available in conjunction with the use of the **GYMNASIUM**. If indicated below and reflected in the charge, these facilities will be available to the **LESSEE**. The **LESSEE** hereby specifically assumes responsibility for these facilities.

Those items indicated below will be made available under this Agreement:

Chalkboard Yes \_\_\_\_\_ No \_\_\_\_\_

PA System Yes \_\_\_\_\_ No \_\_\_\_\_

Scoreboards Yes \_\_\_\_\_ No \_\_\_\_\_ Number Needed \_\_\_\_\_

Tables Yes \_\_\_\_\_ No \_\_\_\_\_ Number Needed \_\_\_\_\_

Chairs Yes \_\_\_\_\_ No \_\_\_\_\_ Number Needed \_\_\_\_\_

**LESSEE’S LIABILITY**  
The **LESSEE(S)** shall be responsible for the supervision and control of its agents, employees, guests, and contractors, and their activities on **SCHOOL NAME** premises. The **LESSEE** agrees to indemnify and hold harmless, assume liability for and defend, the State of Louisiana, Advance Baton Rouge and **SCHOOL NAME** and its officers, employees and agents, from and against any and all actions, claims, liabilities, assertions or liability, losses, costs, and expenses, which in any manner arise or are alleged to have arisen, from the acts, omissions or wrongful conduct of **LESSEE**, in connection with **LESSEE**’s operations, activities, occupancy, or use of the **SCHOOL NAME** premises. **SCHOOL NAME** may, at its discretion, require the **LESSEE** to furnish a Certificate of Insurance. Such insurance shall designate “**SCHOOL NAME its officers, employees and agents”** as an additional insured under the policy. Such policy shall be issued with a minimum “A-“ AM Best rating, and signed by an authorized agent, as evidence of **LESSEE**’s financial ability to meet its obligation under this section.

The policy minimums will be:

Commercial General Liability (CGL):

General Aggregate,

Including Products & Completed Operations $1,000,000

Each Occurrence $1,000,000

Deviation from these requirements and limits is only allowed with advance written permission of **SCHOOL NAME** Office of Operation Management.

\_\_\_\_\_\_\_\_\_\_ **Insurance Required**. A Certificate of Insurance must be filed with the Office of Operations Management, at least 15 days prior to the **EVENT.**

**ENTIRE AGREEMENT**  
This agreement constitutes the entire Agreement between the parties relating to use of the **SCHOOL NAME GYMNASIUM** and supersedes any previous agreements or understandings.

**GOVERNING LAW/OVERBEARING LAW**  
This Agreement shall be construed according to the laws of the STATE NAME

**AUTHORITY**  
The person(s) signing below for the **LESSEE** are presumed to have authority to bind that organization to this Agreement. In the event or to the extent that is not true, the signer agrees to assume personally all of the obligations and commitments herein agreed.

|  |  |
| --- | --- |
| School Name | Sponsoring Organization |
| (Name of authorized signature)  Title: | (Name of organization)  Title: |
|  | Address: |
| Signature: | Signature: |
| Date: | Date: |
|  |  |
| (Name of School Principal) |  |
| Title: |  |
| Signature: |  |
| Date: |  |

**NOTE: *Please request enough time for your event as other* school *events will not be pre-empted!***

## **Fire Drill Procedure**

**SIGNAL**: Fire Alarm Bell

**PROCEDURE DURING CLASS TIME**

1. Students exit classroom and WALK in a single line.
2. Students evacuate the building by designated routes to the assembly area.
3. **NO TALKING IS PERMITTED**
4. **Teachers:**

a. Take your roll book/class roster with you.

b. Check that all students are out of the classroom.

c. Check that all exits are clear.

d. Close classroom door. DO NOT LOCK. (Later entry may be required.)

1. In assembly area, teacher takes roll and accounts for each child.
2. Students in classrooms other than their own are to remain with that class until given permission to rejoin their class.

a. Students remain in orderly and silent lines until all clear signal is given.

b. After returning to the classroom, teacher takes roll and accounts for each child.

**PROCEDURE USED BEFORE SCHOOL DURING LUNCH AND RECESS**

1.Students WALK to the assigned place on the yard where they meet their teacher before school.

2. Students wait in orderly and silent lines for their teacher, or other supervising adult, to conduct them to their proper assembly area.

**PROCEDURE WHEN NOT IN YOUR OWN CLASSROOM**

1.Teachers should be familiar with assembly area and evacuation route designated for that classroom or area. 2.The roll book/class roster should accompany the class and be used by the teacher, or supervising adult, to account for all students.

**ALL SCHOOL PERSONNEL ARE TO PARTICIPATE DURING A FIRE DRILL**

Parents, guests and community people on the grounds during a drill must participate.

**ASSEMBLY AREAS Area 1:**      **Area 2:**      **Area 3:**

## 

### Fire Drill Report

There must be at least one drill per month during the school year.

**FIRE DRILL REPORT**

Top of Form

|  |  |  |
| --- | --- | --- |
| Date: |  | |
| Name of School: |  | |
| Address: |  | |
| Time Required to Empty School: |  | |
| Number of Pupils: |  | |
| Does each room have a leader? | YES | NO |
| Did they exit in an orderly manner? | YES | NO |
| Has provision been made to manage disabled children? | YES | NO |
| Remarks: | | |
| Signature of Lead Administrator: | | |

Fires are not predictable. A regularly used exit may be blocked by FIRE! Did you drill using blocked exit?   
(Use an adult holding a sign saying FIRE.)

The original Fire Drill Report shall be completed on **THE DAY OF THE DRILL** and a scanned PDF shall be forwarded via email to the Director of Operations, the Director of School Support Services, and to the School Operations Manager. If scanning is not an option, the report is to be faxed to these individuals.

**BASIC INSTRUCTIONS**

The fire alarm shall not be used except as a signal for the evacuation of the building.

Fire Drills should be held frequently at irregular intervals and secret times. Discretion should be used in holding fire drills in inclement weather.

In case an actual fire breaks out in any part of the building the first duty of any person discovering the fire is to sound the alarm. No attempt should be made on the part of the teaching staff to extinguish the fire until the safe exit of all pupils is made.

The original Fire Drill Report shall be maintained at the school office in a file labeled “Fire Drill Reports” followed by numbers designating the current school year (i.e. 2010-11).

## **Maintenance Request Procedure**

There are times when the regular maintenance duties of the custodial staff do not fully cover the needs of the school. Whenever the scope of an activity falls outside of the duties of the custodial staff, please fill out the Maintenance Request Form (below). The form should be sent to and signed by the School Operations Manager who will handle the request. After the work is completed, the Maintenance Request Form will be faxed back to the School Operations Manager to document the completion.

## 

### Maintenance Request Form

**MAINTENANCE REQUEST FORM**

Top of Form

|  |  |  |
| --- | --- | --- |
| Type of Work Order: |  | |
| Date: |  | |
| Employee’s Name: |  | |
| Email Address: |  | |
| Room Number: |  | |
| Identify below the need for maintenance. Include location (room number, teacher name, hallway, specific piece of equipment, etc.) and description of work to be done. | | |
|  | | |
| Employee Signature | | Date |
| Principal’s Signature (required) | | Date |
|  | | |
| FOR OPERATIONS OFFICE USE | | |
| Approved by: |  | |
| Date: |  | |
| Order of Importance: | Must do now  As soon as possible  As time permits | |
| Maintenance Personnel Assigned: |  | |
| Inspected upon completion by: |  | |

Bottom of Form

## **Outdoor and Grounds Management**

The entire school grounds must be properly maintained on a routine and preventive basis. School grounds can be defined as the full extent of all school property, including school sites, the central office, and other administrative or support facilities. This includes, but is not limited, to:

* courtyards
* exterior lighting and signage
* outdoor learning equipment
* pools
* museums
* bike trails
* modular facilities
* paved surfaces (e.g., sidewalks, parking lots, and roads)
* athletic fields (including synthetic surfaces such as Astroturf )
* vacant property owned by the district

Duties consist of keeping school grounds clear of trash, glass, leaves, and other debris; sweeping sidewalks, parking lots, and paved play areas; hosing down sidewalks, steps, and outside entrance areas; maintaining the lawn in a neat and presentable condition by mowing grass, trimming around the building, sidewalks, fence lines, etc.; pulling weeds and trimming shrubbery as necessary; and spreading mulch in tot-lots as needed. During winter months remove snow and ice from sidewalks, entrances, and bus loading and unloading areas.

### Supervisors/Grounds Keepers Frequency Chart

**SUPERVISORS/GROUNDS KEEPERS FREQUENCEY CHART**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **OUTDOOR AND GROUNDS CARE  SUPERVISORS/GROUNDS KEEPERS FREQUENCY CHART** | | | | | |
| **DUTIES** | **Daily** | **Weekly** | **Monthly** | **Annually** | **As Required** |
| Pick up trash & debris |  |  |  |  |  |
| Sweep entrances & sidewalks |  |  |  |  |  |
| Inspect play area pavement |  |  |  |  |  |
| Remove graffiti |  |  |  |  |  |
| Check playground equipment |  |  |  |  |  |
| Rake grounds |  |  |  |  |  |
| Remove leaves |  |  |  |  |  |
| Clean storm drain grating |  |  |  |  |  |
| Clean roof drains |  |  |  |  |  |
| Inspect gutters & downspouts |  |  |  |  |  |
| Mow lawn (in season) |  |  |  |  |  |
| Trim around building & walks |  |  |  |  |  |
| Trim along fence lines |  |  |  |  |  |
| Pull weeds |  |  |  |  |  |
| Trim shrubbery |  |  |  |  |  |
| Remove ice & snow |  |  |  |  |  |
| Salt icy areas |  |  |  |  |  |
| Replace burnt out light bulbs |  |  |  |  |  |

## 

## **Other Maintenance and Operations Issues**

*Boilers* – Boilers, which can be used to generate hot water for domestic use (e.g., kitchens, showers, and bathrooms) or for heating buildings, should definitely be included in an organization’s preventive maintenance program. Most large boilers are subject to state or local inspection laws, which typically require that the boiler be maintained on a regular basis (at least annually) and that maintenance records be kept on-site. Records of hours of operation and fuel use must also be maintained on-site and made available to inspectors. Moreover, permits may be required for boilers that generate more than 10,000,000 btu/hour. Energy-saving techniques include equipping boilers with hot-water temperature resets (which adjust the temperature of the hot water being produced based on the outside temperature) and using boiler economizers to capture and recycle heat that would otherwise be lost in the stacks.

*Electrical Systems* – Electrical equipment must be maintained like any other piece of equipment, whether it is a distribution pole with transformers or a breaker box for controlling a classroom’s electrical power. Professional engineers and electricians should help to determine preventive maintenance tasks and schedules for electrical components. Thermo graphic scanning, which identifies overheating in connections, motors, bearings, and other electrical switchgear, can be an important tool for determining the condition of electrical gear (the principle behind the test is that a loose connection, bad bearing, or bad breaker bars will produce more heat than a proper connection). With the widespread use of computers, the proper maintenance of electrical systems is more important than ever. Reliance upon extension cords and an excessive number of power poles is an indication that permanent upgrades to the electrical system are needed. However, upgrading existing electrical systems in old buildings must be carefully managed. Building codes vary by locality, but whatever procedures, standards, and inspection requirements exist are designed for standardization and safety and must be carefully followed by school personnel.

*Energy Management* – The cost of energy is a major item in any school budget. Energy Management Systems are computer-controlled systems that operate HVAC units. They can automatically turn on and off air conditioning, lights, and boilers according to pre-programmed instructions entered by facilities staff. The following guidelines will help to accomplish more efficient energy management:

* Establish an energy policy with specific goals and objectives.
* Assign someone to be responsible for the district’s energy management program, and give this energy manager access to top-level administrators.
* Monitor each building’s energy use.
* Conduct energy audits in all buildings to identify energy-inefficient units.
* Institute performance contracting (i.e., contracts requiring desired results rather than simply a list of needed products) when replacing older, energy-inefficient equipment.
* Reward schools that decrease their energy use.
* Install energy-efficient equipment, including power factor correction units, electronic ballast, high-efficient lamps, night setbacks, and variable-speed drives for large motors and pumps.
* Install motion detectors that turn lights on when a room is occupied (and off when the room is unoccupied).

*Floor Coverings* – Often lunchrooms, main halls, and secondary halls are covered in terrazzo, vinyl composition tile (VCT), or quarry tile. These coverings have hard surfaces that are easily cleaned and do not collect dirt. In classrooms where noise control is important, carpets with an impermeable backing, which prevents the passage of water or dirt and are easily cleaned, may be used. Carpets can also be purchased with adhesives already attached to the backing, which helps to ensure complete adhesion without the emission of volatile organic compounds (VOCs). Some primary schools use area rugs rather than carpets, because they can be easily removed and cleaned at the end of the school year or as needed. Periodic cleaning of both carpets and rugs is necessary to minimize the likelihood of dirt and other contaminants causing indoor air quality problems.

*Gym Floors* – Gym floors are generally constructed with vinyl composition tile (VCT), one of several grades of maple flooring, sheet rubber, or other synthetic materials. Regardless, all floor types must be kept clean and properly maintained. VCT floors must be periodically stripped and re-waxed to ensure a safe surface. Wood floors require annual screening and resealing with a water-based sealant. They should also be sanded, re-marked, and resealed in their entirety every 10 years. Synthetic floors (including sheet rubber but excluding asbestos tile) require monthly cleaning and scrubbing with buffers.

*Heating, Ventilation, and Air Conditioning (HVAC) Systems* – All schools require HVAC systems to control indoor climate if they are to provide an environment that is conducive to learning. In fact, oftentimes a school’s ability to convene classes depends on acceptable climate control. Different regions of the country may place emphasis on different elements of the HVAC system, but the bottom line is the same: HVAC components must be maintained on a timely and routine basis. This preventive maintenance will ensure reliability, reduce operating costs, and increase the life expectancy of the equipment.

Two effective ways to improve HVAC performance are through air balancing and water balancing. Air balancing ensures that the desired amount of air reaches each space in the building, as specified in the mechanical plans. Water balancing ensures that the flow of water from the chiller and boiler is in accordance with the mechanical plans. Water balancing is normally performed before air balancing. Balancing is usually conducted upon installation of new equipment and at 5- to 8-year intervals. Balancing should also be conducted when building space is substantially modified or room use is changed dramatically.

*Hot Water Heaters* – Hot water heaters in schools range in size from small 10-gallon heaters to the larger 100- to 300-gallon units. Preventive maintenance programs must be established for each hot water heater. At a minimum, maintenance should include inspection for failing safety devices and leaks (especially if fired by natural gas).

*Kitchens* – Kitchens present special problems for school districts: not only must equipment be maintained properly to ensure reliability, but 1) a high state of cleanliness must be maintained in all food preparation areas; 2) the use of certain cleaning agents may be discouraged in food preparation areas; and 3) ovens and stoves pose special fire safety concerns. Floor surfaces are also of particular concern in kitchens since they must be easy to clean yet slip-resistant. Recommended floor surfaces for kitchens include terrazzo, vinyl composition tile (VCT), quarry tile, and sealed concrete.

*Painting* – Painting should be done on a regular schedule that is published well in advance of work dates to minimize inconvenience to building occupants. Painting needs are determined largely by the type of surface, the type of paint applied previously, and surface use (e.g., a window pane may be expected to receive less wear than a chair rail). A wall constructed of concrete masonry units (CMU) and painted with a two-part epoxy can last 8 or 10 years whereas drywall will require painting every 5 or 6 years. Bathrooms, special education areas, and other high-traffic areas will require painting on a more frequent schedule. A durable, cleanable (i.e., able to be cleaned by the custodial staff with their standard tools), paint from a major manufacturer should be used for indoor areas. Water-based latex paints are a good choice because they are low in volatile organic compounds (VOCs) and do not produce noticeable odors. Surfaces must be properly prepared for painting, which may require the use of a primer to cover stains and discolored patches.

*Plumbing* – Sprinkler systems, water fountains, sump pumps, lift pumps, steam traps, expansion joints, and drains are likely targets for preventive maintenance. Standing water must be avoided at all costs, since it damages building materials and can lead to mold concerns that affect indoor air quality.

*Public Address Systems and Intercoms* – These communications tools are vital to the management of school buildings and, in an emergency, the safety of building occupants. Public address (PA) systems must be connected to the emergency power system to ensure uninterrupted communications in the event of a power failure. Public address systems and intercoms should be tested on a daily basis during the broadcast of a school’s morning announcements. If broadcast systems fail to perform properly, they must be repaired immediately.

*Roof Repairs* – The key to maintaining good roofs is the timely removal of water from the surface and substructure of the roof. Thus, all leaks and damaged tiles must be repaired as soon as possible to prevent water damage and mold growth. On composition built-up roofs, hot tar is the only appropriate repair method. Single-ply and modified roofs should be repaired in accordance with the manufacturer’s instructions. The facility manager must verify the annual assessment of each roof within the district, recording the date of installation, type of roof, type and thickness of insulation, type of drainage, and type and frequency of repair work. Detailed drawings or photographs that show the location of repairs should be maintained, as should contact information for the installing contractor. This information is extremely important in the event of a major roofing problem or an insurance or warranty claim.

## **Security**

### Building and Grounds Management and Security

The care, custody, and safekeeping of all school property shall be the general responsibility of the CEO. He/she shall establish such procedures and employ such means from time to time as may be necessary to provide accurate information in regard to the nature, condition, location, and value of all school property; to safeguard school property against loss, damage, or undue depreciation; to recover and restore to usefulness any school property which may be lost, stolen, or damaged; and to do all things necessary to insure the proper maintenance and safekeeping of school property.

Maintenance shall be provided to schools by a maintenance department headed by a maintenance supervisor and supervised by the CEO. Within the school, the maintenance supervisor is responsible for the proper care and maintenance of buildings, equipment and grounds. He/she shall outline and post the duties of custodians and supervise as many of their activities as possible ([See Responsibilities: Day/Night Crew](#_Responsibilities:_Day_Crew)).

Buildings and grounds of the school constitute one of the greatest investments of the school. It is deemed in the best interest of the school to protect these investments adequately.

Security should mean not only maintenance of a secure (locked) building, but also protection from fire hazards and faulty equipment, and safe practices in the use of electrical, plumbing, and heating equipment. The school Committee requires and encourages close cooperation with local police, fire, and sheriff’s departments and with insurance company inspectors.

Access to school buildings and grounds outside of regular school hours shall be limited to personnel whose work requires it. An adequate key control system shall be established which will limit access to buildings to authorized personnel and will safeguard against the potential of entrance to building by unauthorized persons ([See School Key Policy](#_School_Key_Policy_1)).

Funds and valuable records shall be kept in a safe place and under lock and key.

Protective devices designed to be used as safeguards against illegal entry and vandalism shall be installed when appropriate to the individual situation. Employment of security personnel may be approved in situations where special risks are involved.

### Staff Protection

The school will be vigorous in its protection of all employees from physical and/or psychological abuse. Any employee who is threatened with harm is to notify his or her school leader or supervisor immediately, so that steps can be taken at once to protect the employee’s safety.

The school may protect its employees against claims that may be entered against them as a result of carrying out their assigned responsibilities.

To protect its own financial resources as well, the school will provide for sufficient liability coverage for personnel, workmen’s compensation coverage, malpractice insurance as found

## **Additional Resources**

The following is a list of additional resources.

Beyond Pesticides - *http://www.beyondpesticides.org*

A nonprofit membership organization formed to serve as a national network committed to pesticide safety and the adoption of alternative pest management strategies.

Budgeting for Facilities Maintenance and Repair Activities - *http://www.nap.edu/books/NI000085/html/index.html*

An online publication that focuses on how to estimate future facility maintenance and repair needs. Federal Facilities Council, Standing Committee on Operations and Maintenance, National Research Council (1996) National Academy Press, Washington, DC.

Children’s Environmental Health Network - *http://www.cehn.org*

A national multidisciplinary project dedicated to promoting a healthy environment and protecting children from environmental hazards. The site presents a variety of useful publications and materials.

Custodial Methods and Procedures Manual *http://asbointl.org/Publications/PublicationCatalog/index.asp?s=0&cf=3&i=139*

A manual that discusses school facility cleaning and maintenance from the perspective of work management, physical assets management, and resource management. A reference section contains guidelines and forms for custodial equipment storage and care, as well as safety measures and employee management forms. Johnson, Donald R. (2000) Association of School Business Officials International, Reston, VA, 96pp.

Facilities Audit: A Process for Improving Facilities Conditions

A handbook presenting a step-by-step approach to all phases of facility inspection. It is designed to help a facility manager assess the functional performance of school buildings and infrastructure and provides information about how to quantify maintenance deficiencies, summarize inspection results, and present audit findings for capital renewal funding. Kaiser, Harvey (1993) APPA, The Association of Higher Education Facilities Officers, Washington, DC, 102pp.

Facilities Evaluation Handbook: Safety, Fire Protection, and Environmental Compliance, 2nd Edition

A guide to help plant and facilities managers conduct inspections and evaluations of their facilities in order to identify and address problems in the areas of maintenance, safety, energy efficiency, and environmental compliance. Petrocelly, K. L. and Thumann, Albert (1999) Fairmont Press, Lilburn, GA, 200pp.

Facilities Information Management: A Guide for State and Local School Districts

*http://nces.ed.gov/forum/publications.asp*

A publication that defines a set of data elements that are critical to answering basic policy questions related to elementary and secondary school facility management. Facilities Maintenance Task Force, National Forum on Education Statistics (2003) National Center for Education Statistics, Washington, DC.

Facility Management

*http://www.facilitymanagement.com*

The online home of American School and Hospital Maintenance Magazine. This site is intended to help facility managers stay informed about current issues and the latest products.

Good School Maintenance: A Manual of Programs and Procedures for Buildings, Grounds and Equipment

*http://www.iasb.com/shop/details.cfm?Item\_Num=GSM*

A manual that describes the fundamentals of good school maintenance, including managing the program and staying informed about environmental issues. Procedures for maintaining school grounds are detailed, as are steps for maintaining mechanical equipment, including heating and air-conditioning systems, sanitary systems and fixtures, sewage treatment plants, and electrical systems. Harroun, Jack (1996) Illinois Association of School Boards, Springfield, IL, 272pp.

Green Schools

*http://www.ase.org/greenschools*

A comprehensive program designed for K-12 schools to create energy awareness, enhance experiential learning, and save schools money on energy costs.

Healthier Cleaning & Maintenance: Practices and Products for Schools

A paper that provides guidance to schools with regard to selecting, purchasing, and using environmentally preferable cleaning products. Healthy Schools Network, Inc. (1999) New York State Association for Superintendents of School Buildings and Grounds, Albany, NY, 8pp.

Healthy School Handbook: Conquering the Sick Building Syndrome and Other Environmental Hazards In and Around Your School

A compilation of 22 articles concerning "sick building syndrome" in educational facilities, with attention given to determining whether a school is sick, assessing causes, initiating treatment, and developing interventions. Miller, Norma L., Ed. (1995) National Education Association, Alexandria, VA, 446pp.

Indoor Air Quality and Student Performance

*http://www.epa.gov/iaq/schools/performance.html*

A report examining how indoor air quality (IAQ) affects a child's ability to learn, including case studies of schools that successfully addressed their indoor air problems, lessons learned, and long-term practices and policies that have emerged. Indoor Environments Division, U.S. Environmental Protection Agency (2000) U.S. Environmental Protection Agency, Washington, DC.

Indoor Air Quality (IAQ) Tools for Schools

*http://www.epa.gov/iaq/schools/*

A U.S. Environmental Protection Agency kit showing schools how to carry out a practical plan for improving indoor air problems at little or no cost by using straightforward activities and in-house staff. The kit includes checklists for school employees, an IAQ problem-solving wheel, a fact sheet on indoor air pollution issues, and sample policies and memos.

Maintenance Planning, Scheduling and Coordination

A book focusing on the preparatory tasks that lead to effective utilization and application of maintenance resources: planning, parts acquisition, work measurement, coordination and scheduling. Nyman, Don and Levitt, Joel (2001) Industrial Press, New York, NY, 320pp.

Mercury

*http://www.epa.gov/mercury/index.html*

A web site of the U.S. EPA intended to provide information about reducing the amount of mercury in the environment. It includes both general and technical information about mercury and mercury-reduction strategies.

National Clearinghouse for Educational Facilities (NCEF)

*http://www.edfacilities.org*

A web site that includes reviews of and links to cutting-edge education facilities news; a calendar of conferences, workshops, and other facilities management-related events; a gallery of photos showing off innovative and provocative building design and construction from real schools across the nation; categorized and abstracted resource lists with links to full length, online, publications; and pointers to other organizations that provide online and off-line resources about education facilities management. NCEF can also be reached toll free at 888-552-0624.

National School Safety Center

*http://www.nssc1.org/*

An internationally recognized resource for school safety information, training, and violence prevention. The web site

contains valuable summaries of school safety research, including contact information for locating the studies.

Occupational Safety and Health Administration (OSHA)

*http://www.osha.gov/*

The web site of OSHA, which has as its core mission to save lives, prevent injuries, and protect the health of America’s workers. To accomplish this, federal and state governments works in partnership with the more than 100 million working men and women and their 6.5 million employers who are covered by the Occupational Safety and Health Act of 1970.

Planning Guide for Maintaining School Facilities

*http://nces.ed.gov/pubs2003/2003347.pdf*

A publication that is designed for staff at the local school district level where most facility maintenance is planned, managed, and carried out. Facilities Maintenance Task Force, National Forum on Education Statistics (2003) National Center for Education Statistics, Washington, DC.

Practical Guide for Commissioning Existing Buildings

*http://www.ornl.gov/~webworks/cppr/y2001/rpt/101847.pdf*

A document that describes commissioning terminology, the costs and benefits of commissioning, retro-commissioning, steps to effective commissioning, and the roles of team members in the commissioning process. Haasl, T. and Sharp, T. (1999) U.S. Department of Energy, Washington, DC.

Preventive Maintenance Guidelines for School Facilities K-12

*http://www.rsmeans.com/index.asp*

A five-part manual that is intended to increase the integrity and support the longevity of school facilities by providing easy-to-use preventive maintenance system guidelines. It includes a book, wall chart, and electronic forms designed to help maintenance professionals identify, assess, and address equipment and material deficiencies before they become costly malfunctions. Maciha, John C, et al. (2001) R.S. Means Company, Inc., Kingston, MA, 232pp.

School Design Primer: A How-To Manual for the 21st Century

*http://www.edfacilities.org/pubs/li/little.html*

A resource that describes the school planning and design process for decision-makers (e.g., superintendents, planning committee members, architects, and educators) who are new to school construction and renovation projects.

SchoolDude

*http://www.schooldude.com/*

A site that connects school facility professionals with each other to solve problems, share best practices, and improve learning environments. This includes tools for work management, information, and resources, as well as online procurement for equipment and school supplies. Some sections are accessible only to fee-paying members.

SchoolFacilities.com

*http://www.schoolfacilities.com*

A professional support network for school facility administrators and support personnel that provides school-related news, products, resources, and facility management tools.

SchoolHouse Plant Operation & Maintenance Resource Center: School House Library

*http://faststart.com/cps/Library.html*

An online library containing reports dealing with various aspects of plant operation and maintenance that relate to the operation of school buildings.

U.S. Environmental Protection Agency (EPA)

*http://www.epa.gov/*

The main web site of the EPA, whose mission is to protect human health and safeguard the natural environment – air, water, and land – upon which life depends. The EPA works with other federal agencies, state and local governments, and Indian tribes to develop and enforce regulations under existing environmental laws. The web site includes an alphabetical index of topical issues available at http://www.epa.gov/ebtpages/alphabet.html. EPA Regional Office and Linked State Environmental Departments can be found at

http://www.epa.gov/epapages/statelocal/envrolst.htm.

U.S. Equal Employment Opportunity Commission (EEOC) - *http://www.eeoc.gov*

The web site of the EEOC, which is charged with enforcing numerous employment-related federal statutes.

# FINANCE

## **Credit Card Policy**

**Corporate Credit Card Policy – Company Pay**

**Summary**

* The corporate card cannot be used for cash advances, non-business related purchased or the purchase of alcohol
* Both entities are tax exempt. As such when using the credit card, the user should ensure that the vendor is provided with the tax exempt forms and that, when possible, they are not charged state sales tax.
* Card numbers should not be distributed beyond the cardholder’s designee and should not be saved in online accounts that others have access to.
* Receipts need to be turned in to the finance department no later than one week of the closing date of the statement.

**Background**

The preferred payment method at school name is through vendor invoices and corporate checks. This method allows for budget compliance and insures that the organization gets certain discounts and does not pay sales taxes. However, in some cases, this is not feasible for a variety of reasons. As such, select people at school name are provided with corporate credit cards.

**Eligibility**

Only personnel specifically authorized by the Chief Executive Officer are provided with corporate credit cards.

**Allowable Uses**

Corporate credit cards are for business purposes only of the entity for which the card is issued (joint purchases related to multiple entities are acceptable). Corporate cards may not be used for cash advances for any reason. **Under no circumstances shall a school corporate card be used for the purchase of alcohol.** Corporate credit cards are not intended for purchases that can otherwise be paid for using corporate checks. Instead they are intended for vendors that do not accept corporate checks, purchases during travel or emergency purchases.

**Tax Exemption**

All entities are exempt from state name state sales tax. The documentation is available upon request from the finance department of school operations staff. All purchasers should provide this information to vendors at the time of purchase and do what is feasible to ensure that they are not paying state name state sales tax on purchases.

**Card Number Security**

The person whose name the corporate credit card is in is solely responsible for all purchases on the card and ensuring that their credit card number is not used by unauthorized personnel. As such, the cardholder shall NOT share their card number with anyone other than their official designee. In addition, the credit card should not be stored in an online account that anyone other than the cardholder and their designee have access to.

**Approvals**

All purchases with corporate cards are to be expressly approved by the cardholder along with the budget manager (if different). No purchases shall be made for amounts not included in the entities budget.

**Statements**

Credit card statements are mailed directly to the finance department. The finance department then scans the statements and emails it to the cardholder and their designee.

**Receipts**

The credit card holder or their designee is responsible for receiving, printing and retaining all receipts related to credit card purchases. This includes receipts related to online purchases and restaurant purchases. The cardholder or their designee shall label all receipts with a description of what it is for to ensure proper coding by the finance department. **All receipts must be submitted to the finance department within one week of the closing date of their statement.** Original receipts should be sent by inter-office mail to the finance department (with a copy retained by the card holder or their designee). If time is an issue, receipts can be scanned and emailed or faxed to the accounting coordinator (please verify that the fax went through if this method is used) to meet the deadline and then the original receipts can be sent via inter-office mail at a later date. If a receipt is accidentally lost, a written description of the items and cost must be submitted by chief executive officer (or their designee) or the respective principal. Please understand that we routinely are audited on our credit cards and thus it is especially important that all food and large purchases are properly documented with the receipt.

**Termination**

Upon the termination of employment of a cardholder for any reason, all cards must be cancelled and returned to the designated person, along with any other company owned items.

**Policy Violations**

Violations of this policy may result in anything from a warning to cancellation of the card to termination, depending on the severity of the violation. The following is the progression of violations:

* A cash advance, use of the card for non-business purposes, or use of a school card for alcohol – Either cancellation of the card or termination, at the discretion of the Chief Executive Officer.
* Use of the card by an unauthorized person (or transaction) – Any instances will be reported to the Chief Executive Officer along with the cardholder and may result in termination.
* First minor offense: If all receipts are not provided by the deadline (receipts under $25 exempted), a warning will be issued.
* Second minor offense within 6 months: If all receipts are not provided by the deadline (receipts under $25 exempted) a second time, a second warning will be issued along with a reduction in the credit line.
* Third minor offense within 6 months: If all receipts are not provided by the deadline (receipts under $25 exempted) a third time within 6 months, the card will be cancelled.

### Credit Card Policy Acknowledgement

**Corporate Credit Card – Company Pay**

**Policy Acknowledgement**

**Primary Card Holder**

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, hereby acknowledge that I have received/am requested a corporate credit card in my name. I have been provided with and read the corporate credit card policy, and I understand that I am responsible for complying with the policy rules. I understand that violation of such policy may result in consequences including cancellation of my card or my termination.

I would like to designate \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as an authorized user of my card.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Primary Card Holder Signature Date

**Designee**

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, hereby acknowledge that I have been designated as a user of the primary card holder above. I understand that all charges that I make using the card will be approved by the primary card holder before I use the card. I have been provided with and read the corporate credit card policy, and I understand that I am responsible for complying with the policy rules. I understand that violation of such policy may result in consequences including cancellation of my card or my termination.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Designee Signature Date

### Credit Card Policy – Employee Pay

**Corporate Credit Card Policy – Employee Pay**

**Summary**

* The corporate card cannot be used for cash advances, non-business related purchased or the purchase of alcohol (alcohol will not be reimbursed)
* Both entities are tax exempt. As such when using the credit card, the user should ensure that the vendor is provided with the tax exempt forms and that, when possible, they are not charged state sales tax.
* Card numbers should not be distributed beyond the cardholder’s designee and should not be saved in online accounts that others have access to.
* Expense reports along with the related receipts need to be turned in to the finance department in order to be reimbursed.

**Background**

Some employees routinely make business purchases and would prefer to have a separate card for such purchases with the company’s name on it. While the employee is 100% responsible for all charges on the card and paying the bills on time, in some cases the credit line will not count against their personal credit rating (although all failures to pay will).

**Eligibility**

Only personnel specifically authorized by the Chief Executive Officer or Chief Financial Officer are provided with employee paid corporate credit cards. While the company can fill out the application on the employee’s behalf, approval is dependent on the individual’s credit score.

**Allowable Uses**

Employee pay corporate credit cards are intended for business purposes only. Corporate cards may not be used for cash advances for any reason. Purchases of alcohol will not be reimbursed by a school. Corporate credit cards are not intended for purchases that can otherwise be paid for using corporate checks. Instead they are intended for vendors that do not accept corporate checks, purchases during travel or emergency purchases.

**Tax Exemption**

All entities are exempt from State sales tax. The documentation is available upon request from the finance department of school operations staff. All purchasers should provide this information to vendors at the time of purchase and do what is feasible to ensure that they are not paying state sales tax on purchases.

**Card Number Security**

Employee pay corporate credit cards should be treated like other personal credit cards. The person whose name the corporate credit card is in is solely responsible for all purchases on the card and ensuring that their credit card number is not used by unauthorized personnel. As such, it is recommended that the cardholder not share their card number with anyone other than their official designee. In is also recommended that the credit card not be stored in an online account that anyone other than the cardholder and their designee have access to.

**Bill Payment**

The cardholder is solely responsible for the payment of employee pay corporate credit cards, along with any late fees and finance charges.

**Expense Reimbursement**

The cardholder (or their designee) must file an expense report in accordance with expense reimbursement policies in order to get reimbursed for any purchases on their employee pay corporate credit card. The expense reimbursement policy requires receipts for purchases along with the approval of the employee and their manager. The credit card holder or their designee is responsible for receiving, printing and retaining all receipts related to credit card purchases. This includes receipts related to online purchases, and restaurant purchases. Typically reimbursements for properly completed and approved expense reports are mailed within two weeks of submission.

**Statements**

Credit card statements may be mailed to either the individual or to the finance department (if the employee prefers to view statements on line).

**Termination**

Upon the termination of employment of a cardholder for any reason, all cards must be returned to the designated person, along with any other company owned items.

**Policy Violations**

Violations of this policy may result in anything from a warning to cancellation of the card to termination, depending on the severity of the violation. Because charges are only reimbursed when evidenced by a receipt and properly approved, failure to provide receipts will mean that the employee will NOT be paid for such charges.

### Credit Card Policy – Employee Pay Acknowledgement

**Corporate Credit Card – Employee Pay**

**Policy Acknowledgement**

Primary Card Holder

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, hereby acknowledge that I have received/am requested a employee pay corporate credit card in my name. I have been provided with and read the corporate credit card policy, and I understand that I am responsible for complying with the policy rules. I understand that violation of such policy may result in consequences including cancellation of my card or my termination.

I would like to designate \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ as an authorized user of my card.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Primary Card Holder Signature Date

Designee

I, \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, hereby acknowledge that I have been designated as a user of the primary cardholder above. I understand that all charges that I make using the card will be approved by the primary cardholder before I use the card. I have been provided with and read the corporate credit card policy, and I understand that I am responsible for complying with the policy rules. I understand that violation of such policy may result in consequences including cancellation of my card or my termination.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Designee Signature Date

## **Direct Deposit Form**

To set up your Direct Deposit, simply fill out this form and send it to the school HR Office. **Please attach a voided check for each checking account – not a deposit slip.**

Below is a sample check detailing the necessary information you will need to obtain to complete this form.

Memo

**:** 0 1 2 3 4 5 6 7 8 **:**  1 2 3 4 5 6 7 8 9 0 1 0 1

Check #

(this number matches the number in the upper right corner of the check – not needed for sign-up

Checking Account #

Routing/Transit #

(A 9-digit number always between these two marks)

**Important! Please read and sign before completing and submitting this form.**

I hereby authorize my employer, Advance Baton Rouge Charter School Initiative (hereinafter “ABR”) to deposit any amounts owed me by initiating credit entries to my account(s) at the financial institutions (hereinafter “Bank”) indicated on this form. Further, I authorize Bank to accept and to credit any credit entries indicated by ABR to my accounts. In the event ABR deposits funds erroneously into my account, I authorize ABR to debit my account for an amount not to exceed the original amount of the erroneous credit.

This authorization is to remain in full force and effect until ABR and Bank have received written notice from me of its termination in such time and in such manner as to afford ABR and Bank reasonable opportunity to act on it.

Employee Name (print): Social Security # \_\_ \_\_ \_\_ - \_\_ \_\_ - \_\_ \_\_ \_\_ \_\_

Employee Signature: Date:

**New Account Information**

**Make sure to indicate what kind of account and the amount to be deposited if less than your total net paycheck.**

1. Bank Name/City/State:

Routing/Transit #: \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ Account Number:

Checking Savings I wish to deposit: $ . or Entire Net Amount

1. Bank Name/City/State:

Routing/Transit #: \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ Account Number:

Checking Savings I wish to deposit: $ . or Entire Net Amount

**Current Account Changes or Closing Information**

1. Bank Name/City/State:

Routing/Transit #: \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ Account Number:

Checking Savings I wish to deposit: $ . or Entire Net Amount

Change Amount Close Account

1. Bank Name/City/State:

Routing/Transit #: \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ \_\_ Account Number:

Checking Savings I wish to deposit: $ . or Entire Net Amount

Change Amount Close Account

(Note: The direct deposit will take effect on the second pay period after you have notified Payroll. The first pay period after a change is made to Bank accounts results in a “live check.”)

## **Expense Reimbursement**

### Expense Reimbursement Policy

No staff members other than specifically authorized individuals are permitted to accept cash and/or checks.   
  
All School events for which money is collects must be approved PRIOR to the event by the School leader and the Finance Department.

The School’s Operations Manager will supervise the collection of all fees and will be responsible for managing the receipts of the Finance Department.

Teachers and students are not permitted to do fundraising or fee collection; rather all financial transactions should be coordinated with the School’s Operations Manager and the Finance Department.

Cash and personal checks should not be stored or locked in staff offices or desks.

A purchase requisition must be completed by the teachers and approved by the School leader prior to ordering materials. Any items purchased without an approved purchase requisition will be the responsibility of the purchaser. Receipts and invoices with an approval must be given to the School leader before reimbursement checks can be issued,

### Expense Reimbursement Form

**Instructions for Employee**:

1. List each transaction separately; all forms must be accompanied by original receipts
2. Enter all required fields; under *Description*, list purpose of and location
3. Print and sign this form
4. Staple copies of receipts to this signed form and give to your supervisor

**FOR OFFICE USE ONLY**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Date *(Required)*** | **Vendor Paid (Where Purchased) *(Required for non-driving expense)*** | **Receipt Amount (*Required)*** | **Description (Purpose of Expense) *(Required)*** | **Account Code** |
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|  | **Total Invoice** | $ |  |  |

Employee’s Signature Date

School Operations Manager Signature Date

## **Fundraising**

### Request for Fundraising Activity

**REQUEST FOR FUNDRAISING ACTIVITY**

Fundraiser requests must be submitted at least two (2) weeks prior to the date the fundraiser is to be held.

School Name

To: Date:

Principal

From:

Club/Program (Fund)

Approval of the following fundraising activity by this school is hereby requested:

Type of Activity:

Dates to be held:

Estimated faculty time involved:

Total Amount to be raised by Activity: $

Cost of Activity: $

Net Profit for Activity: $

Profit to be used for:

Requester Signature

Approved: Approved:

Principal School Operations Manager

### Fundraiser Financial Report Instructions

Step1: Enter School Name

Step 2: Enter the teacher/sponsor of the club or fundraiser

Step 3: Enter the name of the club or fundraiser

Step 4: Enter the date the fundraiser began and the date it ended

Step 5: Enter the date the funds were collected

Step 6: Enter the date the funds were submitted to the SOM for deposit.

Step 7: Enter the amount submitted to the SOM. The SOM will issue the teacher/sponsor a receipt as confirmation of funds received from the teacher/sponsor.

Step 8: Enter a description of what the funds were collected from (i.e. candy sale)

Step 9: At the end of the club or fundraiser enter the amount of total revenues collected.

Step 10: Enter all expenses for the club and include the date, amount, check number and item purchased.

Note: All expenses should be paid in the form of a check and not paid through cash from collection. If the teacher/sponsor must pay an item out of the collections please not this on the check number column.

Step 11: At the end of the club or fundraiser enter the amount of total expenses.

Step 12: Enter the total profit or loss. (Total Revenue – Total Expense)

Step 13: Enter the total profit or loss percentage. (Profit/Total Revenue)

Step 14: At the end of the club or fundraiser signatures from the following are required: teacher/sponsor, SOM, and principal.

Step 15: The SOM will take the fundraiser/club form and compare to his/her fundraiser/club form.

If there are any discrepancies the teacher/sponsor and the SOM must review and make any necessary adjustments.

Please note: The fundraiser financial report is due to the School Operations Manager one (1) week after the conclusion of the fundraiser.

**TEACHER/SPONSOR’S RESPONSIBILITIES BELOW ARE STRICTLY ENFORCED!!**

* + - 1. Please attach copies of all invoices, checks received, receipts, and full explanation for any losses of inventory, uncollected monies, or unusual transactions.
      2. It is the responsibility of the teacher/sponsor to have a receipt for all student/parent collections such as Tshirt purchases, parent funded field trip, items purchases, etc.

### Fundraiser Financial Report Form

**FUNDRAISER FINANCIAL REPORT FORM**

Top of Form

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| School Name: |  | | | |
| Teacher/Sponsor: |  | | | |
| Fundraising Activity: |  | | | |
| Dates for fundraiser: | Beginning Date: | | Ending Date: | |
| **Revenues:** | | | | |
| Date Funds Collected | Date Submitted SOM | | Amount Submitted | Description |
|  |  | |  |  |
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|  |  | |  |  |
|  |  | |  |  |
| Total Revenues: | $ | |  |  |
| **Expenses:** | | | | |
| Date | Items Purchased | | Check Number | Total Cost |
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| Total Expenses: | $ | |  |  |
| Profit (Loss) from fundraiser  (Total Revenue – Total Expenses) | | | $ |  |
| Profit (Loss) Percentage (Profit/Total Revenue) | | | $ |  |
| Please attach copies of all invoices, checks received, receipts, and full explanation for any losses of inventory, uncollected monies, or unusual transactions | | | | |
| Signature of Fundraiser Teacher/Sponsor | | Date | | |

Bottom of Form

### Fundraiser Financial Report Sample

**FUNDRAISER FINANCIAL REPORT FORM SAMPLE**

Top of Form

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| School Name: | Charter Elementary | | | | |
| Teacher/Sponsor: | John Doe | | | | |
| Fundraising Activity: | 4-H Club | | | | |
| Dates for fundraiser: | Beginning Date: 7/21/09 | | Ending Date: 6/1/10 | | |
| **Revenues:** | | | | | |
| Date Funds Collected | Date Submitted SOM | | Amount Submitted | Description | |
| 2/1/10 | 2/2/10 | | $ 1,014.00 | World’s Finest Chocolate Sales | |
| 2/15/10 | 2/16/10 | | $ 250.00 | World’s Finest Chocolate Sales | |
| 3/10/10 | 3/11/10 | | $ 100.00 | Concession Sales | |
| 3/15/10 | 3/16/10 | | $ 215.00 | Sock Hop | |
|  |  | |  |  | |
| Total Revenues: | $ 1,579.00 | |  |  | |
| **Expenses:** | | | | | |
| Date | Items Purchased | | Check Number | | Total Cost |
| 1/15/09 | World’s Fines Chocolate | | 1508 | | $ 990.00 |
| 3/14/10 | Sam’s Club – Concessions | | 1700 | | $ 80.00 |
|  |  | |  | |  |
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| Total Expenses: | $ 1,070.00 | |  | |  |
| Profit (Loss) from fundraiser  (Total Revenue – Total Expenses) | | | $ 509.00 | | |
| Profit (Loss) Percentage (Profit/Total Revenue) | | | 32% | | |
| Please attach copies of all invoices, checks received, receipts, and full explanation for any losses of inventory, uncollected monies, or unusual transactions | | | | | |
| Signature of Fundraiser Teacher/Sponsor | | Date | | | |

Bottom of Form

## **Guidelines for Handling School Funds**

### Guidelines for Handling School Funds For Staff

**Guidelines for Handling School Funds**

As a teacher and/or sponsor of a particular extracurricular school club or activity, it may be necessary for you to collect and receive money from students in your class(es) or extracurricular club/activity. Before any money is solicited from students or parents, administration must give formal approval of the activity.

The following are the Advance Baton Rouge’s policies that must be adhered to when handling these monies:

1. Written receipts should be prepared in duplicate and a copy issued to the individual from whom monies over $1.00 are received. Teachers and sponsors are responsible for keeping duplicate receipt copies and turning them in to the School Operations Manager when funds are submitted for deposit. Receipts should be accurate and filled out completed (name, date, and amount). If a mistake is made in preparing a receipt, both copies are marked “VOID”, and a new receipt should be made.
2. Teachers and sponsors must turn collections in to the school operations manager and receive a receipt for the amount turned in. Any amount over $10.00 should be turned in at the first possible opportunity. Amounts under $10.00 can be turned in periodically, but teachers should not keep money in their classrooms overnight. Reasonable precautions should be taken to protect all funds until they have been formally deposited. All school employees assume complete responsibility for funds in their care if these funds are lost or stolen due to their negligence or inappropriate safekeeping.
3. Report any stolen or missing funds in writing to the Principal and to the School Operations Manager as soon as it is discovered. Keep a copy for your records.
4. On a regular basis, check the status or balance of your account/fund and report in writing to administration any suspected discrepancies. No checks shall be drawn on a school fund account without a balance sufficient to cover the check request or without proper authorization.
5. If, any reason, question, suspicion, or concern arises relative to the collection, handling, or depositing of school funds, contact the Finance Manager (XXX.XXX.XXXX) immediately.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Club, Activity, or Class Level Printed Name of Teacher/Sponsor

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date Signature of Teacher/Sponsor

**This form must be completed and submitted to the human resource office to be kept in the employees' personnel file at the beginning of each school year by all employees.**

### Guidelines for Handling School Funds for SOMs

**School Operations Manager’s**

**Guidelines for Handling School Funds**

As the School Operations Manager (SOM) it will be necessary to collect and receive money from students, teachers, sponsors of extracurricular club/activity, etc. Before any money is solicited from students or parents, administration must give approval of the activity.

The following are the school’s policies that must be adhered to when handling these monies:

1. Written receipts should be prepared in duplicate and a copy issued to the individual from whom monies over $1.00 are received (this includes monies received from students, parents, staff or sponsors of any activity/club).
2. The SOM is responsible for keeping duplicate receipt copies and turning them in to Finance with the backup of the deposit was made. Receipts should be accurate and filled out completed (name, date, amount and description). If a mistake is made in preparing a receipt, both copies are marked “VOID”, and a new receipt should be made.
3. When you have collected any amount over $500.00 it must be deposited within 48 hours and/or the next business day. Amounts under $500.00 can be deposited weekly. Reasonable precautions should be taken to protect all funds until they have been formally deposited. The SOM assumes complete responsibility for funds in his/her care if these funds are lost or stolen due to their negligence or inappropriate safekeeping.
4. Report any stolen or missing funds in writing to Principal and Finance Manager as soon as it is discovered. Keep a copy for your records.
5. NO funds collected should be used as petty cash or used to pay people for services such as security guards, referees, concession workers, etc. If for any reason funds must be taken to be used as petty cash a receipt must be given with the reason for payment and approved by the Principal.

1. If, any reason, question, suspicion, or concern arises relative to the collection, handling, or depositing of school funds, call the Finance Manager (XXX.XXX.XXXX).

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

School Printed Name of SOM

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date Signature of SOM

**This form must be completed and submitted to the human resource office to be kept in the employees' personnel file at the beginning of each school year by all employees who must handle school funds.**

## **Invoice Approval**

### Invoice Approval Form

Vendor Name:

Invoice Number:

Entity Name: Enter Entity (See below: pick from list)

Top of Form

|  |  |  |  |
| --- | --- | --- | --- |
| **Expense Category:** (See below: pick from list) | **Amount:** | **Purpose/Explanation of Expense:** | **Account Code:** |
| Enter Account Title |  |  |  |
| Enter Account Title |  |  |  |
| Enter Account Title |  |  |  |
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| **Total Amount** | **$** |  |  |

Bottom of Form

SOM Approval: Date:

Principal Approval (>$500): Date:

Senior Accountant Approval (>$1000): Date:

Chief Operations Officer Approval (>$2500): Date:

Executive Director Approval (>$5000): Date:

Board Chair Approval (>$10,000): Date:

### Invoice Approval Form Choices

|  |  |  |  |
| --- | --- | --- | --- |
| **Enter Account Title** | **Account Code** | **Account Description** | **Enter Entity** |
| Assessment | 110323 | Testing materials including state & national standardized assessments, assessment grading or online assessments. |  |
| Athletic Consultants | 142321 | Non-supply costs related to athletic programs such referees through an agency and league participation fees |  |
| Athletic Supplies | 142611 | Uniforms, sports equipment, or other non-people items used in athletic programs. |  |
| Business Supplies | 250611 | Supplies used for the accounting and finance functions including blank checks. |  |
| Business Temps/Consultants | 250333 | Financial accounting and processing services, CFO services, financial audits, tax support and other consultants and temporary service providers that support the finance and accounting areas. A portion of the fees should be coded here as well as payroll company fees. |  |
| Classroom Supplies | 110611 | Supplies used in the classroom, whether by students or teachers. This should be used as the default supply code unless specific information identifies a more appropriate account. |  |
| Consumables | 110643 | Workbooks, textbooks or manipulatives that last less than one year related to any subject |  |
| Copier Rental | 110440 | Costs related to the rental of copiers including lease costs, copier maintenance contracts (such as per copy charges) or other ongoing copier maintenance costs. Outsourced copies made due to copy machine failures should be coded here. Other outsourced copies should be coded to the account closest to the use of the copies. |  |
| Custodial Services & Supplies | 262420 | Costs associated with cleaning the facilities including cleaning/maintenance companies, cleaning supplies and bathroom supplies. |  |
| Durables Curriculum (Non-Capital) | 110642 | Textbooks, reading books and other curriculum materials that last more than a year but do not qualify for capitalization. |  |
| Education Management Organizations | 110328 | Fees paid to the primary organizations hired to manage the educational programs of the schools. Charges from Replications, and [ORGANIZATION] fees would be coded here. |  |
| Educational Consultants | 110321 | Consultants outside of education management companies that advise on the implementation of the education design or other educational matters. |  |
| Educational Magazines | 110644 | Subsciptions to magazines or newspapers provided to students, used in the classroom or provided to staff. |  |
| Educational software | 110616 | Software used in the educational program |  |
| Equipment & Furniture (Non-Capital) | 110730 | Equipment & furniture that does not qualify to be capitalized and is used at the school other than in the administrative office such as a desktop computer, overhead projectors, printers, student desks, teacher desks & chairs, and carts |  |
| Equipment (Capital) | 2050 | Desktops, laptops, audio visual equipment, copiers and other equipment owned by the entity that meets the capitalization requirements |  |
| Extracurricular Consultants | 141321 | Non-supplies costs related to after school activities such as after school permit fees, competition costs, and club organization dues. Special program consultants karate and dance teachers not on payroll would be included here as well. |  |
| Extracurricular Supplies | 141611 | Supplies and materials related to non-athletic after school activities such as club travel costs, competition supplies, uniforms and club equipment |  |
| Facility Development Costs | 260400 | Costs associated with finding, acquiring and developing new facilities including those associated with buildings that, for whatever reason, are abandoned. Write-offs of facility improvements and leasehold improvements on facilities that are abandoned should also be coded here. |  |
| Field Lessons | 110617 | Costs related to field trips including trips to local businesses, colleges and museums. |  |
| Food for Food Service Program | 310630 | Actual food purchased by the school to be prepared by the school or sold directly to students and staff. |  |
| Food for Special Events | 110618 | Food for school events including parent events, special occasion parties or student rewards. Food service program shortfalls (such as lunch) should be coded under food service management. Food for in-house professional development meetings should be coded under professional development. |  |
| Food Service Management | 310570 | Third party providers of food service services including meal preparation & delivery, and food service cash collectors. |  |
| Fundraising Consultants | 290330 | Consultants hired to support the entity's fundraising efforts. |  |
| Fundraising Supplies | 290611 | Fundraising and communications materials such as meals with potential fundraisers, travel, parking, telephone calls, mailings, gifts to fundraisers, event costs and marketing materials |  |
| Furniture & Facility Depreciation | 260740 | An allocation of capitalized furniture and facility expenditures over time to account for their long-term use. Tables, Teacher desks and leasehold improvements would be expensed in this category over time. |  |
| Furniture & Fixtures (Capital) | 2040 | Office furniture, teacher furniture, student desks, air conditioners and fixtures used at one of the entities that meets the capitalization requirements. |  |
| General Admin Consultants | 230310 | Consultants used in the general administration of the Board or for systemwide improvements. |  |
| General Admin Supplies | 230611 | Supplies used in the general administration of the Board or for systemwide improvements. |  |
| General Ed Miscellaneous | 110619 | General education and program materials that do not fit into any of the other definitions |  |
| Guidance Consultants | 212300 | Consultants that provide guidance, college counselor, college prep or similar services. Actual course costs would be coded to tuition. |  |
| Health Consultants | 213300 | Medical related consultants such as nurses, doctors or emergency services. |  |
| Human Resource Consultant | 283330 | Consulting costs associated with recruiting such as recruiting agency fees. Also includes human resource consultants such as benefit plan administration and development. Referral fees to employees should be coded to the closest stipend category for the referring employee. |  |
| Insurance | 310520 | Insurance costs such as general liability, property insurance, educators legal liability and directors & officers insurance. Costs associated with workman's compensation, disability unemployment and other employee benefits should be coded to the related personnel accounts. |  |
| Interest Expense | 250830 | Interest on borrowings including interest on temporary, short term or long-term financing facilities. |  |
| Legal | 240332 | Law firm fees and litigation defense fees, including the costs of legal settlements. Severance and other employee payroll items should be coded under the appropriate payroll account. |  |
| Library Books | 225641 | Books for either a school library or classroom library that are not assigned to particular students. |  |
| Maintenance & Repairs | 262430 | Ongoing facility & grounds related maintenance and repair costs including things like repairs to air conditioners and water fountains. Also includes minor improvements that do not qualify for capitalization but represent improvements to the facilities such as painting, student art boards and other temporary improvements. |  |
| Mobile Phones | 110533 | Cell phone charges including data packages used by staff for business related calls. Phone charges at hotels for professional development conferences should be included in the professional development account bucket. |  |
| Moving Expenses | 260490 | Shipping, packing, temporary storage, moving company and other costs associated with moving to a new location. One-time setup costs and cleanup associated with a move would also be coded here. |  |
| Non-Instructional Equipment & Furniture | 240730 | Equipment and furniture used outside of the classroom such as file cabinets, office fax machine or printer and office furniture. |  |
| Non-Instructional Travel & Food | 240580 | Travel, food and other costs not associated with professional development. Such costs would include taxi costs at night, travel costs between entities, or costs associated with meetings with the district. |  |
| Office Supplies | 240611 | Supplies used primarily in the administrative offices such as folders, binders, pens, pencils and paper clips. The majority of supplies are used within the classroom or by teachers and should be coded to the classroom supplies account. |  |
| Ongoing R&D Consultants | 281321 | Consultants used in researching best practices, designing new systems or development new educational programs. |  |
| Other Consultants | 240339 | Non-educational consultants not classified elsewhere. |  |
| Paper/Copier Supplies | 110614 | Copy paper, tonor, staples or other supplies used in making copies. |  |
| PC After School Club - ROTC | 7050 | Amounts collected from students, parents or fundraisers for ROTC along with amounts paid for such club costs. |  |
| Postage & Shipping | 240535 | Costs associated with mailing or shipping goods including couriers. Typical vendors for this include Federal Express and the United States Postal Service. Postage machine and online postage service costs would also be coded here. |  |
| Prepaid Expenses | 1090 | Amounts paid for in advance of services rendered or goods received. Some examples include medical insurance or liability insurance. |  |
| Principal Payments | 250910 | Principal payments on borrowings including both long term and short-term financing facilities. |  |
| Professional Development OTPS | 223325 | Costs related to the training of principals, teachers or any other employees. Food at staff meetings, staff gifts, conference costs, space rental costs for training or any other professional development related cost other than travel would be coded here. |  |
| Psych & Soc Work Consultants | 214300 | Consultants that provide psychological counseling, social work services or development individualized educational plans (IEPs) |  |
| Rent | 260440 | Rent for school buildings, office space, temporary facilities, or other spaces. Also includes fees for building use outside of the normal school day. |  |
| School Admin Miscellaneous | 240619 | Non-instructional costs not classified elsewhere. |  |
| Software (Capital) | 2080 | Software systems such as educational software or fundraising software that meets the capitalization requirements. Costs would include both the purchase of the software plus installation and related setup costs. Annual or monthly maintenance costs or user fees are expensed in the current year. |  |
| Sped Consultants | 120330 | Third party providers of special education services such as general special education services, speech & language an occupational & physical therapy. |  |
| Sped Consummables | 120643 | Any books, classroom supplies, classroom equipment or other materials used primarily for the special education program |  |
| Startup Consultants | 281330 | Consultants used in support of opening a new school or adding a new grade including curriculum development, initial training, conferences and mentoring. |  |
| Startup Supplies | 281611 | Supplies used in support of opening a new school or starting a new grade including curriculum development, initial training, conferences and mentoring. |  |
| Student Recruiting & Parent Involvement | 240540 | Costs incurred to attract and retain students such as advertising. Also includes costs associated with parent involvement and community development such as parent committee costs, parent mailings, non-recruiting parent information sessions, community information sessions or community sponsorships. |  |
| Student Security | 260300 | Security consultants or agencies hired to keep students and staff safe during the school day, after school activities, Saturday school or any other school related functions. Consultants hired for safety/drug training or to write safety plan would also be coded here. |  |
| Student Tuition | 110560 | Tuition paid to third parties on behalf of students at the school such as college level course costs at a local university, college preparation courses or online education courses. |  |
| Summer School Supplies | 149611 | Costs outside of salaries related to running the summer school program such as materials or permit fees. Costs associated with books & materials provided to students to read over the summer would also be included here. |  |
| Teacher Recruiting & Orientation | 283540 | Costs associated with recruiting new staff to any of the entities including advertising, job postings, job fairs, travel for potential recruits, and recruiting meals. |  |
| Technology Depreciation | 284740 | An allocation of capitalized technology expenditures over time to account for their long-term use. Computers, smart board and other high cost technology equipment would be expensed in this category over time. |  |
| Technology Maintenance | 284430 | Costs associated with installing and maintaining the technology infrastruction of the entity including computer repair costs, network maintenance costs and website costs. A portion of the [ORGANIZATION] fees should be coded here. |  |
| Technology Supplies | 284611 | Supplies and small items associated with the technology infrastructure including replacement keyboards, routers, and cables |  |
| Telecom, Fax & Internet Usage | 240531 | Landline telephone, internet (DSL, cable, T1, etc), fax and all other telecommunications costs other than cell phones. Erate reimbursements related to such costs would also be coded here. |  |
| Temps | 240340 | Non-instructional temporary staffing such as administrative support, operational temps and summer support temps. |  |
| Transportation | 270510 | Outsourced transportation provider costs including buses for field trips and athletic events. |  |
| Travel | 223580 | Costs related to the training of principals, teachers or any other employees. Food at staff meetings, staff gifts, conference costs, space rental costs for training or any other professional development related cost other than travel would be coded here. |  |
| Utilities | 260620 | Gas, electric, water, sewer and other non-telecommunications utilities |  |
| Other |  |  |  |

### Invoice Approval Form Instructions

1. Enter the vendor name as it appears on the invoice.
2. Enter the invoice number as it appears on the invoice.
3. Enter the entity/school from the choices listed.
4. Enter the account title that best matches the description of the product/service.
5. Enter the amount as it appears on the invoice.
6. Enter the purpose/description of the expense.
7. Staple the original invoice to the form.
8. Approvals may be obtained via email, printed, and attached to the approval form.
9. Submit the approval form, with original invoice and approvals (if necessary) attached, to the AP department. Invoices for the previous month are due on the 15th day of the current month.
10. Must have all approvals needed according to the AP Thresholds before payment can be made.
11. Payments will be mailed within 10 days of receipt if all approvals are submitted with invoice.

## **Mileage Reimbursement**

### Mileage Reimbursement Instructions

The Mileage Reimbursement Form is used to cover the mileage expenses incurred by an employee for school business and professional development. Please note that any travel an employee expects to be reimbursed for must first be approved by the School Leader. Approved mileage will be reimbursed at the 2010 IRS standard mileage rate of 50 cents per mile.

### Mileage Reimbursement Form

**MILEAGE REIMBURSEMENT FORM**

Top of Form

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Employee Name |  |  | Program/School |  |
| Employee Address |  |  | For Period |  |
| City, State, Zip |  |  | Rate Per Mile |  |
| Email Address |  |  | Total Mileage |  |
| Phone Number |  |  | Total Reimbursement |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Date | Starting Location | Destination | DescriptionDescription | Mileage | Reimbursement |
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| **Totals** | | | |  |  |

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Employee’s Signature Approver’s Signature

Date Date

### Mileage Reimbursement Sample

**MILEAGE REIMBURSEMENT FORM SAMPLE**

Top of Form

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Employee Name |  |  | Program/School | Charter School High |
| Employee Address | 102 Florida Street |  | For Period | Oct. 1 - 15, 2010 |
| City, State, Zip |  |  | Rate Per Mile | $.50 |
| Email Address |  |  | Total Mileage | 0 |
| Phone Number | 555-555-5555 |  | Total Reimbursement | $0.00 |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Date | Starting Location | Destination | DescriptionDescription | Mileage | Reimbursement |
| 10/14/10 | Charter School High | Hilton Riverside Hotel | Louisiana Charter School Conference | 124 | $62.00 |
| 10/15/10 | Hilton Riverside Hotel | Home Address | Louisiana Charter School Conference | 81.80 | $40.90 |
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| **Totals** | | | | $205.80 | $102.90$102.90 |

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Employee’s Signature Approver’s Signature

Date Date

## **Payroll Calendar**

**20010 -2011**

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Human Resources Documentation  Due to HR | Day | Human Resources Summary  Due to Finance | Day | Timesheets Due | Day | Payroll Summary Due | Day | Processing Date | Day | Period Covered Salaries Employees | Period Covered Non-Salaried Employees | Paychecks Mailed | Day |
| 7/1/10 | THU | 7/6/10 | TUE | 7/7/10 | WED | 7/9/10 | FRI | 7/13/10 | TUE | 7/1/10 - 7/15/10 | 6/23/10 - 7/7/10 | 7/15/10 | THU |
| 7/16/10 | FRI | 7/21/10 | WED | 7/22/10 | THU | 7/26/10 | MON | 7/28/10 | WED | 7/16/10 - 7/31/10 | 7/8/10 - 7/22/10 | 7/30/10 | FRI |
| 8/2/10 | MON | 8/5/10 | THU | 8/6/10 | FRI | 8/9/10 | MON | 8/11/10 | WED | 8/1/10 - 8/15/10 | 7/23/10 - 8/7/10 | 8/13/10 | FRI |
| 8/16/10 | MON | 8/20/10 | FRI | 8/23/10 | MON | 8/25/10 | WED | 8/27/10 | FRI | 8/16/10 - 8/31/10 | 8/8/10 - 8/22/10 | 8/31/10 | TUE |
| 9/1/10 | WED | 9/7/10 | TUE | 9/7/10 | TUE | 9/9/10 | THU | 9/13/10 | MON | 9/1/10 - 9/15/10 | 8/23/10 - 9/7/10 | 9/15/10 | WED |
| 9/16/10 | THU | 9/21/10 | TUE | 9/22/10 | WED | 9/24/10 | FRI | 9/28/10 | TUE | 9/16/10 - 9/30/10 | 9/8/10 - 9/22/10 | 9/30/10 | THU |
| 10/1/10 | FRI | 10/6/10 | WED | 10/7/10 | THU | 10/11/10 | MON | 10/13/10 | WED | 10/1/10 - 10/15/10 | 9/23/10 - 10/7/10 | 10/15/10 | FRI |
| 10/18/10 | MON | 10/21/10 | THU | 10/22/10 | FRI | 10/26/10 | TUE | 10/27/10 | WED | 10/16/10 - 10/31/10 | 10/8/10 - 10/22/10 | 10/29/10 | FRI |
| 11/1/10 | MON | 11/4/10 | THU | 11/5/10 | FRI | 11/8/10 | MON | 11/10/10 | WED | 11/1/10 - 11/15/10 | 10/23/10 - 11/7/10 | 11/15/10 | MON |
| 11/16/10 | TUE | 11/18/10 | THU | 11/19/10 | FRI | 11/22/10 | MON | 11/24/10 | WED | 11/16/10 - 11/30/10 | 11/8/10 - 11/22/10 | 11/30/10 | TUE |
| 12/1/10 | WED | 12/6/10 | MON | 12/7/10 | TUE | 12/9/10 | THU | 12/13/10 | MON | 12/1/10 - 12/15/10 | 11/23/10 - 12/7/10 | 12/15/10 | WED |
| 12/16/10 | THU | 12/17/10 | FRI | 12/17/10 | FRI | 12/20/10 | MON | 12/22/10 | WED | 12/16/10 - 12/31/10 | 12/8/10 - 12/22/10 | 12/30/10 | THU |
| 1/3/11 | MON | 1/6/11 | THU | 1/7/11 | FRI | 1/10/11 | MON | 1/12/11 | WED | 1/1/11 - 1/15/11 | 12/23/10 - 1/7/11 | 1/14/11 | FRI |
| 1/18/11 | TUE | 1/20/11 | THU | 1/21/11 | FRI | 1/25/11 | TUE | 1/27/11 | THU | 1/16/11 - 1/31/11 | 1/8/11 - 1/22/11 | 1/31/11 | MON |
| 2/1/11 | TUE | 2/4/11 | FRI | 2/7/11 | MON | 2/9/11 | WED | 2/11/11 | FRI | 2/1/11 - 2/15/11 | 1/23/11 - 2/7/11 | 2/15/11 | TUE |
| 2/16/11 | WED | 2/18/11 | FRI | 2/21/11 | MON | 2/23/11 | WED | 2/25/11 | FRI | 2/16/11 - 2/28/11 | 2/8/10 - 2/21/10 | 2/28/11 | MON |
| 3/1/11 | TUE | 3/4/11 | FRI | 3/7/11 | MON | 3/9/11 | WED | 3/11/11 | FRI | 3/1/11 - 3/15/11 | 2/22/11 - 3/7/11 | 3/15/11 | TUE |
| 3/16/11 | WED | 3/21/11 | MON | 3/22/11 | TUE | 3/25/11 | FRI | 3/29/11 | TUE | 3/16/11 - 3/31/11 | 3/8/11 - 3/22/11 | 3/31/11 | THU |
| 4/1/11 | FRI | 4/6/11 | WED | 4/7/11 | THU | 4/11/11 | MON | 4/13/11 | WED | 4/1/11 - 4/15/11 | 3/23/11 - 4/7/11 | 4/15/11 | FRI |
| 4/18/11 | MON | 4/21/11 | THU | 4/21/11 | THU | 4/25/11 | MON | 4/27/11 | WED | 4/16/11 - 4/30/11 | 4/8/11 - 4/22/11 | 4/29/11 | FRI |
| 5/2/11 | MON | 5/5/11 | THU | 5/6/11 | FRI | 5/9/11 | MON | 5/11/11 | WED | 5/1/11 - 5/15/11 | 4/23/11 - 5/7/11 | 5/13/11 | FRI |
| 5/16/11 | MON | 5/19/11 | THU | 5/20/11 | FRI | 5/24/11 | TUE | 5/26/11 | THU | 5/16/11 - 5/31/11 | 5/8/11 - 5/22/11 | 5/31/11 | TUE |
| 6/1/11 | WED | 6/6/11 | MON | 6/7/11 | TUE | 6/9/11 | THU | 6/13/11 | MON | 6/1/11 - 6/15/11 | 5/23/11 - 6/7/11 | 6/15/11 | WED |
| 6/16/11 | THU | 6/21/11 | TUE | 6/22/11 | WED | 6/24/11 | FRI | 6/28/11 | TUE | 6/16/11 - 6/30/11 | 6/8/11 - 6/22/11 | 6/30/11 | THU |
| 7/1/11 | FRI | 7/6/11 | WED | 7/7/11 | THU | 7/11/11 | MON | 7/13/11 | WED | 7/1/11 - 7/15/11 | 6/23/11 - 7/7/11 | 7/15/11 | FRI |
| 7/18/11 | MON | 7/21/11 | THU | 7/22/11 | FRI | 7/25/11 | MON | 7/27/11 | WED | 7/16/11 - 7/31/11 | 7/8/11 - 7/22/11 | 7/29/11 | FRI |

## **Personnel**

### Personnel Requisition

The Personnel Requisition Form (PRF) should be completed whenever the principal is requesting for a new position that is not already in the budget.  It requires the SOM and principal approval; once you have that, email to accounting at the same time for approval. If there is a specific person that the principal wants to hire, then you should complete the Request to Hire Form in addition to the PRF.

### Personnel Requisition Form

**PERSONNEL REQUISITION FORM**

|  |
| --- |
| **INSTRUCTIONS/HIRING SCHOOL INFORMATION** |

*This form is used to initiate the recruitment process for all new and existing staff and administrative/professional positions. Please complete all applicable sections of this form. Contact the Office of Human Resources if you need any assistance.*  ***NO OFFERS shall be made, either verbally or in written form, before all approvals on this form are completed.***

|  |
| --- |
| **POSITION INFORMATION** |

Name of Person Completing this Form

Today’s Date

School Position Title Grade Level

Full-Time

Temporary/Length of Assignment

Other

Part-time

Daily Schedule/Hours \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   
  
Name of Person who will Interview \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   
  
Anticipated Start Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Contact Information of Hiring Manager (if different from above)

***Position Status:***

New Position

New Position Authorized by:

Replacement for:

Replacement Position

Reason for Termination:

Last Day Worked: Transferred to (if applicable)

Remaining Vacation Time Due:

Days:

Hours:

Current Job Description on file in Human Resources

(*Description required for processing of this form.)*

Working Job Description Attached

|  |
| --- |
| **BUDGET INFORMATION/APPROVAL** |

Proposed Annual Salary $ + Fringe Benefits   
(*calculate at 25% for full-time or 11.96% for part-time)* $ = Total $

After you have completed this form, please obtain the following authorizing signatures, as appropriate, before forwarding it to the Office of Human Resources. Please allow two to three working days after the Personnel Requisition is received by HR for a position to be announced.

Lead Administrator:

Date:

School Operations Manager:

Date:

HR:

Date:

Senior Accountant:

Date:

|  |
| --- |
| **INFORMATION ABOUT THIS FORM** |

***Initiating a Search/Approval Process***

The Personnel Requisition is the document which authorizes and initiates an employment search, and is required for all position searches. It is completed by the Lead Administrator or the assigned staff personnel of the employing school, approved by the Operations Manager, and forwarded to the Operations Director for approval. Upon authorization from the Operations Director, the requisition is then forwarded to Accounting. No supervisor shall create a position or make an offer of employment without prior Operations Director approval. This applies to full-time and part-time personnel.

|  |
| --- |
| FOR OFFICE OF HUMAN RESOURCES USE ONLY |

Date Requisition Received \_\_\_\_\_\_\_/\_\_\_\_\_\_/\_\_\_\_\_ \_

Date Position Posted: \_\_\_\_\_\_\_/\_\_\_\_\_\_/\_\_\_\_\_\_\_\_

Advertising Sources:

New Hire: Start Date:

Search Comments:

### Personnel Action Form

**PERSONNEL ACTION FORM**

TRANSFER SALARY CHANGE  PERSONAL CHANGE REACTIVATE  SEPARATION OTHER

**SCHOOL:**

**FIRST NAME:**  **LAST NAME**:       **MIDDLE NAME**:

|  |
| --- |
| **CHANGE PERSONAL --\_PERSONAL DATA** **EFFECTIVE DATE:** |

NEW NAME:      NEW HOME PHONE:

NEW ADDRESS:                 

(STREET) (APT #) (CITY) (STATE) (ZIP CODE)

New Marital Status: Married Single New Taxes: Fed W/H       State/Local W/H      Cease Direct Deposit

Date of Marital Status Charge:       Change Insurance Coverage to       Semi-monthly Contribution Amt $

|  |
| --- |
| **CHANGE –SALARY/ POSITION/ STATUS EFFECTIVE DATE:** |

REASON FOR ADJUSTMENT: Transfer Promotion Merit Increase Status Change Stipend Bonus Other

**Transfer/Promotion/Merit Increase/Stipend/Bonus:**

Previous Job Title:      New Job Title:

Current (Old) Pay Rate: $      New Pay Rate: $      Increase (Decrease) Amount $

Reason (be specific and detailed):

**Status Change:**

Old Status: FT Regular PT Regular TEMP Old Status:  Exempt   Non-Exempt (OT Eligible)

New Status: FT Regular PT Regular TEMP New Status:   Exempt   Non-Exempt (OT Eligible)

|  |
| --- |
| **SEPARATION / LEAVE OF ABSENCE** **EFFECTIVE DATE**: |

Separation Reason: Voluntary Resignation  Resignation  Involuntary Other Reason        
 (i.e., job abandonment)

Last Day Worked:       Separation Effective Date:       Eligible for Rehire: Yes  No Reason:

(be specific and detailed)

Unused Earned Vacation to be paid upon Separation: Yes No Number of Hours Owed:

Leave of Absence (Please attach the employee’s written request for a leave of absence and/or a doctor’s note):

Start Date of Leave:      Reason for Leave:

Return from leave of absence Return Date:       (Attach a doctor’s note if absence was for medical reasons)

|  |
| --- |
| **APPROVALS (in order of approval process)** |

**SOM: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Principal/Dept. Head Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Finance: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Human Resources: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |
| --- | --- |
| **HR/SOM/PAYROLL USE ONLY OPERATIONS USE ONLY** | |
| Request resignation letter Date:      By:  Complete PAF and send to payroll Date:      By:  Contact employee to collect school items or confirm with SOM items have been collected.  Roll Book Grade Book School keys  Other  Terminate email account Date:      By:  Terminate in Paychex Date:       By:  Terminate benefits Date:       By:  Submit term to state/DOL Date:      By:  Complete Exit Interview Date:      By:  Personnel file to term cabinet Date:      By:  Issue final paycheck (paper) Date:      By: | Terminate access in:  JPAMS  LEADS  EGMS  Building Access Code  By:      Date: | |

## **Petty Cash Request**

### Petty Cash Request Form

|  |  |  |  |
| --- | --- | --- | --- |
| PETTY CASH REQUEST FORM | | | |
| **Person Requesting Funds** |  | **Ending Date** |  |
| **Entity** |  |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Account Description** | **Account #** | **Date** | **Vendor** | **Description of Goods** | **Amount** |
| Previous Balance |  |  |  |  |  |
| Cash Received |  |  |  |  |  |
| Enter Account Title |  |  |  |  |  |
| Enter Account Title |  |  |  |  |  |
| Enter Account Title |  |  |  |  |  |
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| Enter Account Title |  |  |  |  |  |
| **Total Expensed** |  |  |  |  |  |
| **Implied Ending Balance** |  |  |  |  |  |
| **Actual Cash On Hand** (Counted from the petty cash box) |  |  |  |  |  |
| **Difference** |  |  |  |  |  |
| **Explanation of Any Difference** | |  | | | |
| **Amount Requested** | |  | | | |

All Expenses Require Original Receipts  
Descriptions for travel are required to include city & state going to as well as purpose.  
Descriptions for meals are required to include the name of all people eating.  
Descriptions for client entertainment are required to include date, purpose and client (donor) names.

Requester’s Signature Date

Approver’s Name Approver’s Signature Date

### Petty Cash Request Form Choices

|  |  |  |  |
| --- | --- | --- | --- |
| **Enter Account Title** | **Description** | **Account #** | **School Entity** |
| Classroom Supplies | Supplies used in the classroom, whether by students or teachers. This should be used as the default supply code unless specific information identifies a more appropriate account. | 110611 | School Name 1 |
| Field Lessons | Costs related to field trips including trips to local businesses, colleges and museums. | 110617 | School Name 2 |
| Food for Special Events | Food for school events including parent events, special occasion parties or student rewards. Food service program shortfalls (such as lunch) should be coded under food service management. Food for in-house professional development meetings should be coded under professional development. | 110618 | School Name 3 |
| Durables Curriculum (Non-Capital) | Textbooks, reading books and other curriculum materials that last more than a year but do not qualify for capitalization. | 110642 | School Name 4 |
| Consumables | Workbooks, textbooks or manipulatives that last less than one year related to any subject | 110643 | School Name 5 |
| Professional Development OTPS | Costs related to the training of principals, teachers or any other employees. Food at staff meetings, staff gifts, conference costs, space rental costs for training or any other professional development related cost other than travel would be coded here. | 223325 |  |
| Travel | Costs related to the training of principals, teachers or any other employees. Food at staff meetings, staff gifts, conference costs, space rental costs for training or any other professional development related cost other than travel would be coded here. | 223580 |  |
| Postage & Shipping | Costs associated with mailing or shipping goods including couriers. Typical vendors for this include Federal Express and the United States Postal Service. Postage machine and online postage service costs would also be coded here. | 240535 |  |
| Student Recruiting & Parent Involvement | Costs incurred to attract and retain students such as advertising. Also includes costs associated with parent involvement and community development such as parent committee costs, parent mailings, non-recruiting parent information sessions, community information sessions or community sponsorships. | 240540 |  |
| Non-Instructional Travel & Food | Travel, food and other costs not associated with professional development. Such costs would include taxi costs at night, travel costs between entities, or costs associated with meetings with the district. | 240580 |  |
| Office Supplies | Supplies used primarily in the administrative offices such as folders, binders, pens, pencils and paper clips. The majority of supplies are used within the classroom or by teachers and should be coded to the classroom supplies account. | 240611 |  |
| Non-Instructional Equipment & Furniture | Equipment and furniture used outside of the classroom such as file cabinets, office fax machine or printer and office furniture. | 240730 |  |
| Custodial Services & Supplies | Costs associated with cleaning the facilities including cleaning/maintenance companies, cleaning supplies and bathroom supplies. | 262420 |  |
| Maintenance & Repairs | Ongoing facility & grounds related maintenance and repair costs including things like repairs to air conditioners and water fountains. Also includes minor improvements that do not qualify for capitalization but represent improvements to the facilities such as painting, student art boards and other temporary improvements. | 262430 |  |
| Teacher Recruiting & Orientation | Costs associated with recruiting new staff to any of the entities including advertising, job postings, job fairs, travel for potential recruits, and recruiting meals. | 283540 |  |
| Technology Supplies | Supplies and small items associated with the technology infrastructure including replacement keyboards, routers, and cables | 284611 |  |
| Classroom Supplies | Supplies used in the classroom, whether by students or teachers. This should be used as the default supply code unless specific information identifies a more appropriate account. | 110611 | School Name 1 |
| Field Lessons | Costs related to field trips including trips to local businesses, colleges and museums. | 110617 | School Name 2 |
| Food for Special Events | Food for school events including parent events, special occasion parties or student rewards. Food service program shortfalls (such as lunch) should be coded under food service management. Food for in-house professional development meetings should be coded under professional development. | 110618 | School Name 3 |
| Durables Curriculum (Non-Capital) | Textbooks, reading books and other curriculum materials that last more than a year but do not qualify for capitalization. | 110642 | School Name 4 |
| Consumables | Workbooks, textbooks or manipulatives that last less than one year related to any subject | 110643 | School Name 5 |
| Professional Development OTPS | Costs related to the training of principals, teachers or any other employees. Food at staff meetings, staff gifts, conference costs, space rental costs for training or any other professional development related cost other than travel would be coded here. | 223325 |  |
| Travel | Costs related to the training of principals, teachers or any other employees. Food at staff meetings, staff gifts, conference costs, space rental costs for training or any other professional development related cost other than travel would be coded here. | 223580 |  |
| Postage & Shipping | Costs associated with mailing or shipping goods including couriers. Typical vendors for this include Federal Express and the United States Postal Service. Postage machine and online postage service costs would also be coded here. | 240535 |  |
| Student Recruiting & Parent Involvement | Costs incurred to attract and retain students such as advertising. Also includes costs associated with parent involvement and community development such as parent committee costs, parent mailings, non-recruiting parent information sessions, community information sessions or community sponsorships. | 240540 |  |
| Non-Instructional Travel & Food | Travel, food and other costs not associated with professional development. Such costs would include taxi costs at night, travel costs between entities, or costs associated with meetings with the district. | 240580 |  |
| Office Supplies | Supplies used primarily in the administrative offices such as folders, binders, pens, pencils and paper clips. The majority of supplies are used within the classroom or by teachers and should be coded to the classroom supplies account. | 240611 |  |
| Non-Instructional Equipment & Furniture | Equipment and furniture used outside of the classroom such as file cabinets, office fax machine or printer and office furniture. | 240730 |  |
| Custodial Services & Supplies | Costs associated with cleaning the facilities including cleaning/maintenance companies, cleaning supplies and bathroom supplies. | 262420 |  |
| Maintenance & Repairs | Ongoing facility & grounds related maintenance and repair costs including things like repairs to air conditioners and water fountains. Also includes minor improvements that do not qualify for capitalization but represent improvements to the facilities such as painting, student art boards and other temporary improvements. | 262430 |  |
| Teacher Recruiting & Orientation | Costs associated with recruiting new staff to any of the entities including advertising, job postings, job fairs, travel for potential recruits, and recruiting meals. | 283540 |  |
| Technology Supplies | Supplies and small items associated with the technology infrastructure including replacement keyboards, routers, and cables | 284611 |  |

### Petty Cash Request Form Instructions

The petty cash voucher is meant to be a temporary solution when cash needs to leave the petty cash box before the receipt is available. For example, if a teacher needs to purchase food in the 500 wing of the school, but the petty cash box is in the 100 wing of the school, then the teacher may need to get the cash prior to actually making the purchase. At all times, the sum of the petty cash vouchers, receipts and cash on hand should equal the amount of petty cash provided.

1. Date the petty cash voucher with the date the cash is provided to the staff member.
2. Write the amount provided to the staff member.
3. Write a brief description of the intended purpose of the amount requested by the staff member.
4. Write the name of the staff member who is receiving the cash.
5. Explain to the staff member that they are personally responsible for providing either the receipts or cash totalling the amount of the voucher and that the money is to be spent solely for school purposes.
6. Have that staff member sign the voucher acknowledging this information.
7. Give the staff member the amount of cash listed on the voucher.
8. After the event: Follow up with the staff member to get the cash and receipts on the voucher.
9. Once you receive the receipts and change, either give the voucher to the employee or shred it with them watching.

### Petty Cash Request Sample Form

|  |  |  |  |
| --- | --- | --- | --- |
| PETTY CASH REQUEST FORM | | | |
| **Person Requesting Funds** |  | **Ending Date** | 12/23/10 |
| **Entity** | School Name 1 |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Account Description** | **Account #** | **Date** | **Vendor** | **Description of Goods** | **Amount** |
| Previous Balance |  |  |  |  | 202.64 |
| Cash Received |  |  |  |  | 297.00 |
| Enter Account Title |  | 10/18/10 | Downtown Seafood | Food for PD Event | 38.67 |
| Enter Account Title |  | 10/23/10 | Certified Mail | Package to State Ed | 3.40 |
| Enter Account Title |  | 10/25/10 | My Pizza | Pizza for event a library for 1st year parents | 68.08 |
| Enter Account Title |  | 11/03/10 | Taxi | Taxi from School 1 to School 2 for PD | 8.60 |
| Enter Account Title |  | 11/15/10 | Jake’s Hardware | Screwdriver | 10.99 |
| Enter Account Title |  | 11/25/10 | Binding Shop | Binding for PD books | 23.87 |
| Enter Account Title |  | 12/3/10 | IHOP | Food after museum trip for students | 68.25 |
| Enter Account Title |  | 12/5/10 | Circuit City | Replacement battery charger | 29.99 |
| Enter Account Title |  |  |  |  |  |
| Enter Account Title |  |  |  |  |  |
| Enter Account Title |  |  |  |  |  |
| Enter Account Title |  |  |  |  |  |
| Enter Account Title |  |  |  |  |  |
| Enter Account Title |  |  |  |  |  |
| Enter Account Title |  |  |  |  |  |
| Enter Account Title |  |  |  |  |  |
| Enter Account Title |  |  |  |  |  |
| **Total Expensed** |  |  |  |  | 286.84 |
| **Implied Ending Balance** |  |  |  |  | 212.80 |
| **Actual Cash On Hand** (Counted from the petty cash box) |  |  |  |  | 213.20 |
| **Difference** |  |  |  |  | (.40) |
| **Explanation of Any Difference** | | Didn’t have change for 10/23 postage, teacher accepted $3 | | | |
| **Amount Requested** | | 287.00 | | | |

All Expenses Require Original Receipts  
Descriptions for travel are required to include city & state going to as well as purpose.  
Descriptions for meals are required to include the name of all people eating.  
Descriptions for client entertainment are required to include date, purpose and client (donor) names.

Requester’s Signature Date

Approver’s Name Approver’s Signature Date

### Petty Cash Voucher

**Petty Cash Voucher**

Date:

Amount Provided: $

Expected Use:

Name of Borrower:

I understand that I am being provided the amount above, which will solely be used for school related purposes. I understand that I am responsible for providing a receipt for the good/servies received for this money and returning any change (at which point this voucher will be disposed of). I understand that if I fail to provide the receipt, that I am personally responsible for returning the full amount listed on this voucher to the school.

Signature of Borrower:

## **Purchase Order**

### Purchase Order Form

**PURCHASE ORDER FORM**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **School Information** | | | **Vendor Information** | | |
|  | **Entity:** |  | Name: |  | |
|  | **PO Number:** |  | Website: |  | |
|  | **PO Date:** |  | Phone for Ordering: |  | |
|  | **Requester:** |  | Fax for Ordering: |  | |
|  | **Person Ordering:** |  | Payment Address: |  | |
|  | **Order Date:** |  | City, State and Zip |  | |
|  | **Method of Ordering:** |  |  |  | |
|  | **Item Number** | **Description of Goods** | **Account Description** | **Unite Price** | **Amount** |
| 1 |  |  |  |  |  |
| 2 |  |  |  |  |  |
| 3 |  |  |  |  |  |
| 4 |  |  |  |  |  |
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| 12 |  |  |  |  |  |
| 13 |  |  |  |  |  |
| 14 |  |  |  |  |  |
| 15 |  |  |  |  |  |
|  | **Sub-Total:** |  |  |  |  |
|  | **Shipping, Handling  & Other Charges:** |  |  |  |  |
|  | **Total Requested:** |  |  |  |  |
|  |  |  |  |  |  |
|  | **Approver Signature:** | | **Approver Name:** | | |
|  |  | | | | |
|  | **Delivery Address:** | | **Billing Address:** | | |
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## **Substitute Payroll Summary**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Degreed/Non-Degreed/Long-Term** | **Days Worked** | **Total Days Worked** |
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Preparer’s Name

Preparer’s Signature

### **Receipt for Payment Form For Employees**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Payment Receipt Log | | | | | |
| Submitted By: |  |  |  |  |  |
|  |  |  |  |  |  |
| Date Received | Funds Received From | Amount | Cash or Check | Check No. | Description |
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## **Timesheets**

### Timesheet Instructions

"Hourly Timesheet" should be completed by an employee who is paid hourly, such as a part time employee, or by a salaried employee who is performing services other than required by his/her position as approved by the School Operations Manager (SOM), Principal, HR Director, and Finance. "Substitute & Daily Employee Timesheet" is to be completed by an employee who is paid at a daily rate, such as a substitute teacher, or by an employee who is paid at a rate per session with prior approvals as stated above. "Program Group Timesheet" should be used when there are multiple employees to be paid for an approved program or session at a uniform hourly or session rate.

**Both the employee and manager signature approvals must be included in order for the employee to be paid.**

**Hourly timesheets:**

The Employee Name, School/Entity, and Program Name/Description of Work fields must be completed.

All hours should be rounded to the nearest 1/4 hour (15 minutes)

There are two (2) Time In & Time Out columns for employees that take a break during the workday such as a lunch break.

The Total Hours Column must be calculated for each day and the Period Total row must be consistent with the total hours of the individual days. Please note: when completing the electronic version of the hourly timesheet, the employee must use the drop down menu to select Time In and Time Out hours. Total Hours and Period Totals are calculated automatically.

**Substitute & Daily timesheets:**

The Employee Name, School/Entity, and Program Name/Description of Work fields must be completed.

Time worked should be recorded as "1" for a full day, or "1/2" for a half day (less than 4 hours) under the # of Days/Sessions column.

Type of Sub column must be completed in order for the substitute to receive the appropriate rate.

Teacher Subbing For column should be filled in as accurately as possible. It is understood that substitute teachers may fill in for more than one teacher during a school day.

### Hourly Timesheet

**HOURLY TIMESHEET**

|  |  |
| --- | --- |
| Employee Name: |  |
| School/Entity: |  |
| Program Name/Description of Work: |  |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Date** | **Time In** | **Time Out** |  | **Time In** | **Time Out** |  | **Total  Hours** | **Date** | **Time In** | **Time Out** | |  | **Time In** | **Time Out** |  | **Total**  **Hours** | |
| **Month** |  |  |  |  |  |  |  | **Month** |  |  | |  |  |  |  |  | |
| 23 |  |  |  |  |  |  |  | 8 |  |  | |  |  |  |  |  | |
| 24 |  |  |  |  |  |  |  | 9 |  |  | |  |  |  |  |  | |
| 25 |  |  |  |  |  |  |  | 10 |  |  | |  |  |  |  |  | |
| 26 |  |  |  |  |  |  |  | 11 |  |  | |  |  |  |  |  | |
| 27 |  |  |  |  |  |  |  | 12 |  |  | |  |  |  |  |  | |
| 28 |  |  |  |  |  |  |  | 13 |  |  | |  |  |  |  |  | |
| 29 |  |  |  |  |  |  |  | 14 |  |  | |  |  |  |  |  | |
| 30 |  |  |  |  |  |  |  | 15 |  |  | |  |  |  |  |  | |
| 31 |  |  |  |  |  |  |  | 16 |  |  | |  |  |  |  |  | |
| **Month** |  |  |  |  |  |  |  | 17 |  |  | |  |  |  |  |  | |
| 1 |  |  |  |  |  |  |  | 18 |  |  | |  |  |  |  |  | |
| 2 |  |  |  |  |  |  |  | 19 |  |  | |  |  |  |  |  | |
| 3 |  |  |  |  |  |  |  | 20 |  |  | |  |  |  |  |  | |
| 4 |  |  |  |  |  |  |  | 21 |  |  | |  |  |  |  |  | |
| 5 |  |  |  |  |  |  |  | 22 |  |  | |  |  |  |  |  | |
| 6 |  |  |  |  |  |  |  |  |  |  | |  |  |  |  |  | |
| 7 |  |  |  |  |  |  |  |  |  |  | |  |  |  |  |  | |
|  |  |  |  |  | |  |  |  | | |  |  | |  |  |  |
|  |  |  |  | **Period Total** | |  |  |  | | |  | Period Total | | | |  |

Employee Approval: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Manager Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Manager Approval: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Notes:

Please round all hours to the nearest ¼ hour (15 minutes)

Both the employee and manager approval must be included in order for the employee to be paid.

Please ensure that the Total Hours Columns are calculated correctly and the Period Totals are consistent with the total of the individual days.

There are two Time In & Time Out sections for employees that take a break during their workday such as a lunch break.

### Substitute & Daily Employee Timesheet

**SUBSTITUTE & DAILY EMPLOYEE TIMESHEET**

|  |  |
| --- | --- |
| Employee Name: |  |
| School/Entity: |  |
| Program Name/Description of Work: |  |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| Date | # of days/sessions | Type of sub (if sub): Long-term, degreed, non-degreed\* | Teacher Substituting For |  | Date | # of days/sessions | Type of sub (if sub): Long-term, degreed, non-degreed\* | Teacher Substituting For |
| Month |  |  |  |  | Month |  |  |  |
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### Program Group Timesheet

**PROGRAM GROUP TIMESHEET**

Date:

Hours:

(if employees are paid by session, write 1 session)

School Entity:

Program Name/Description:

|  |  |
| --- | --- |
| **Printed Employee Name** | **Employee Signature** |
|  |  |
|  |  |
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|  |  |
|  |  |

Total # of Employees to be paid:

Managers Name (Printed):

Manager Approval (Printed):

\* Please ensure that both the employee and manager approve prior to submitting the timesheet.

## **Travel and Expense Reimbursement Policy**

Purpose

The School recognizes that employees of may be required to travel or incur other expenses from time to time. The purpose of this Policy is to ensure that (a) adequate cost controls are in place, (b) travel and other expenditures are appropriate, and (c) to provide a uniform and consistent approach for the timely reimbursement of authorized expenses incurred by Personnel. It is the policy of the school to reimburse only reasonable and necessary expenses actually incurred by Personnel.

When incurring business expenses, the school expects Personnel to:

Exercise discretion and good business judgment with respect to those expenses.

Be cost conscious and spend money as carefully and judiciously as the individual would spend his or her own funds.

Report expenses, supported by required documentation, as they were actually spent.

## 

Expense Report

Expenses will not be reimbursed unless the individual requesting reimbursement submits a written Expense Report. The Expense Report, which shall be submitted at least monthly or within two weeks of the completion of travel if travel expense reimbursement is requested must include:

The individual’s name

If reimbursement for travel is requested, the date, origin, destination and purpose of the trip.

An itemized list of all expenses for which reimbursement is requested.

## 

Receipts

Receipts are required for all expenditures billed directly to the school, such as airfare and hotel charges. No expense will be reimbursed to Personnel unless the individual requesting reimbursement submits with the Expense Report original receipts from each vendor showing the vendor’s name, a description of the services provided (if not otherwise obvious), the date, and the total expenses, including tips (if applicable). A credit card receipt or statement may be used to document the vendor and date of an expense, provided other required details of the expenditure are fully documented.

Organization Credit Cards

If a corporate credit card is issued to personnel for travel (and other) organization-related expenses, the requirements for regular expense reports, explaining charges, as described above under “Expenses Reports” must still be met, and charges may not be made for “Non-Reimbursable Expenditures” as described below. Failure to meet the Expense Report requirements, or making of inappropriate charges will result in loss of the credit card.

## 

General Travel Requirements

Necessity of Travel. In determining the reasonableness and necessity of travel expenses, Personnel and the person authorizing the travel shall consider the ways in which the school will benefit from the travel and weigh those benefits against the antici­pated costs of the travel. The same considerations shall be taken into account in deciding whether the benefits to the schooloutweigh the costs, less expensive alternatives, such as participation by telephone or video conferencing, or the availability of local programs or training opportunities, shall be considered.

## 

Air Travel

General. Air travel reservations should be made as far in advance as possible in order to take advantage of reduced fares.

## 

Lodging

Personnel traveling on behalf of the school may be reimbursed at the single room rate in a “business economy” or “budget” hotel for the reasonable cost of hotel accommodations i.e Comfort Inn, Fairfield Inn, Days Inn, Hampton Inn, etc. Convenience, the cost of staying in the city in which the hotel is located, and proximity to other venues on the individual’s itinerary shall be considered in determining reasonableness. Personnel shall make use of available corporate and discount rates for hotels.

## 

Out-Of-Town Meals

Personnel traveling on behalf of the school are reimbursed on a per meal basis at the following rates when they actually incur the cost of a meal. They will not be reimbursed for meals paid for or provided by others.

Breakfast: $ 10.00

Lunch: $ 15.00

Dinner: $ 30.00

Ground Transportation

Employees are expected to use the most economical ground transportation appropriate under the circumstances and should generally use the following, in this order of desirability:

*Courtesy Cars.* Many hotels have courtesy cars, which will take you to and from the airport at no charge. Employees should take advantage of this free service whenever possible. Another alternative may be a shuttle or bus.

*Taxis.* When courtesy cars and airport shuttles are not available, a taxi is often the next most economical and convenient form of transportation when the trip is for a limited time and minimal mileage is involved.

*Rental Cars.* Car rentals are expensive so other forms of transportation should be considered when practical. Employees will be allowed to rent a car while out of town provided that the cost is less than alternative methods of transportation.

## 

Personal Cars

Personnel are compensated for use of their personal cars when used for business travel. When individuals use their personal car for such travel, including travel to and from the airport, mileage will be allowed at the currently approved IRS rate per mile.

In the case of individuals using their personal cars to take a trip that would normally be made by air, mileage will be allowed at the currently approved rate; however, the total mileage reimbursement will not exceed the sum of the lowest available round trip coach airfare.

## 

Parking/Tolls

Parking and toll expenses, including charges for hotel parking, incurred by Personnel traveling on organization business will be reimbursed. The costs of parking tickets, fines, car washes, valet service, etc., are the responsibility of the employee and will not be reimbursed. On-airport parking is permitted for short business trips. For extended trips, Personnel should use off-airport facilities.

## 

Non-reimbursable Expenditures

The school maintains a strict policy that expenses in any category that could be perceived as lavish or excessive will not be reimbursed, as such expenses are inappropriate for reimbursement by a school.

**Form W4 2010**

**PART TWO: STAFFING**

# Human Resources

## **Application for Employment**

Top of Form

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Last Name: | | First Name: | | | | Middle Name: | |
| Desired Position: Clerical | Counselor | Curriculum Coordinator | | | Data Specialist/IT | | Elementary Teacher |
| Leadership Development | Leadership | Librarian | | | Support Staff | | Paraprofessional |
| Social Worker | Speech Pathologist | Substitute Teacher | | | Teacher Subject 1: Subject 2: | | Other: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Source of Referral: Newspaper/Magazine Advertisement Commercial/PSA Referral \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ *If applying for multiple positions please list preferences:* | | | | Website/Online Career Fair Other: Please Specify: | | | |
| Present Street Address: | | | City/State/Zip: | | | Personal Email Address: | |
| Cell Phone Number: | | | Home Phone Number: | | | Date available for work (if offered): | |
| **(If Applicable**) Preferred School: | | | | | | Grade Level | |
| Are there any criminal charges pending against you at this time? If yes, please give details: | | | | | | | |
| Are you a citizen of the United States? YES NO | | | | | | | |
| Have you ever been convicted of a crime? YES NO; If yes, state when, where and the nature of the convection. Conviction of an offence is not an automatic bar to employment. All circumstances will be considered, including the nature of the crime and the length of time since conviction. | | | | | | | |
| Have you been an employee of this school or any other program in the past? Yes NO | | | | | | If Yes, dates of employwment and position: | |

Bottom of Form

Education – List education, Formal Training, Licenses, and Degrees related to the position sought.

Top of Form

|  |  |  |  |
| --- | --- | --- | --- |
| **Type of School** | **City and State of School** | **Course Study and Degree Achieved or # of Credit Hours Completed** | **Date of last attendance or graduation** |
| High School |  |  |  |
| Junior College |  |  |  |
| College |  |  |  |
| Graduate School |  |  |  |
| Other |  |  |  |
| List professional licenses or certifications: | | | |
| List any other languages you can speak / read/ write: | | | |
| Teacher Certification Data (if applicable):  Are you Louisiana certified? Yes No  Certification Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Area(s) of Certification: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date Certification Expires:\_\_\_/\_\_\_/\_\_\_\_\_  If no, are you certified out of state? Yes No If yes, list location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | |
| Teacher Certification Data (if applicable):  Are you Louisiana certified? Yes No  Certification Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Area(s) of Certification: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Date Certification Expires:\_\_\_/\_\_\_/\_\_\_\_\_  If no, are you certified out of state? Yes No If yes, list location: \_\_\_\_\_\_\_\_\_\_\_\_\_\_ | | | |

Bottom of Form

Employment Data: List employment starting with your most recent position.   
Explain any gaps in employment history.   
May we contact your current supervisor? Yes No

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Dates** | **Name and Address of Employer** | **Position Supervisor** | **Major Duties** | **Wages** | **Reason for leaving** |
| From |  | Job Title:  Supervisor Name:  Telephone Number: |  | Starting: $\_\_\_\_\_\_\_\_\_  Hourly Salary |  |
| To: | Ending: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Hourly Salary |
| From: |  | Job Title:  Supervisor Name:  Telephone Number: |  | Starting: $\_\_\_\_\_\_\_\_\_  Hourly Salary |  |
| To: | Ending: $\_\_\_\_\_\_\_\_\_\_\_\_\_  Hourly Salary |
| From: |  | Job Title:  Supervisor Name:  Telephone Number: |  | Starting: $\_\_\_\_\_\_\_\_\_  Hourly Salary |  |
| To: | Ending:  $\_\_\_\_\_\_\_\_\_\_\_  Hourly Salary |

**PLEASE READ THE FOLLOWING CAREFULLY BEFORE SIGNING THIS APPLICATION FORM:**

I authorize investigation of all statements in this application, my attached resume, or other attachments. I understand that the misrepresentation or omission of facts called for is cause for dismissal at any time without previous notice. I hereby give the school initiative permission to contact schools, previous employers (unless otherwise indicated), references and others. I further authorize the company complete a criminal background check. I hereby release the school from any liability as a result of such contacts, inquires or records in order to ascertain my qualifications and fitness for employment. I understand that this application for employment is not a contract and is not intended to confer or create contractual rights of any kind or nature. If employed, employment is on an at-will basis and may be terminated at any time and for any reason with or without cause, by either the employee or the school. I understand that in accordance with the Immigration Reform and Control Act of 1986 that I will need to provide the school with appropriate documentation certifying my identity and eligibility to work within the United States. I understand that I will need to provide this documentation in order to be employed by the school.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Applicants Signature Date

We are an equal opportunity employer. We adhere to a policy of making employment decisions without regard to race, color, religion, sex, national origin, age, physical or mental handicap, sexual orientation, gender identity or expression, or other category protected by law.

## **Employee Warning Notice Form**

Top of Form

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Employee Information** | | | | |
| Employee Name: |  | Date: | |  |
| Employee ID: |  | Job Title: | |  |
| Manager: |  | Department: | |  |
| **Type of Warning** | | | | |
| First Warning | Second Warning | | Final Warning | |
| Tardiness/Leaving Early | Absenteeism | | Violation of Company Policies | |
| Substandard Work | Violation of Safety Rules | | Rudeness to Customers/Coworkers | |
| Other | | | | |
| **Details** | | | | |
| Description of Infraction: | | | | |
| Plan for Improvement: | | | | |
| Consequences of Further Infractions: | | | | |
| **Acknowledgement of Receipt of Warning** | | | | |
| *By signing this form, you confirm that you understand the information in this warning. You also confirm that you and your manager have discussed the warning and a plan for improvement. Signing this form does not necessarily indicate that you agree with this warning.* | | | | |

Employee Signature Date

Manager Signature Date

Witness Signature (if employee understands warning but refuses to sign) Date

## 

## **Job Descriptions**

### Accounts Payable Specialist Job Description

**Accounts Payable Specialist**

General Description: The position requires knowledge of how accounts payable ties into the general ledger, a solid understanding of the disbursements cycle, and working knowledge of day-to-day accounts payable operations.  
  
Responsibilities:

* Work closely with the schools and client central office to ensure the accurate and timely processing of all invoices.
* Foster positive working relationships between the vendors and school staff.
* Ensure proper coding in accordance with the chart of accounts.
* Enter accounts payable transactions into accounting system.
* Process check runs and the set up of new vendors.
* Resolve accounts payable issues with vendors.
* Assist in month end close including identifying necessary accruals.
* Assist with payroll processing.
* Assist with annual audit and meeting other statutory requirements.
* Take on special projects.

Qualifications:   
  
Education: Bachelor’s Degree in Accounting or related field Preferred.   
  
**Preferred skills and work experience**:

* Working knowledge and experience with QuickBooks strongly preferred.
* Experience in Microsoft Excel, Access, Word, and Office.
* Ability to work on multiple tasks and prioritize in order to meet deadlines.
* Excellent attention to detail.
* Strong verbal and written communication skills.
* Ability to provide professional and courteous service.
* Experience and judgment to plan and accomplish goals.
* Ability and willingness to work overtime as necessary to meet deadlines.

Physical Requirements:   
Ability to stand, sit and move between workstations, read monitors and paperwork, write on flip charts, set up audio-visual equipment, and use telephone and keyboard.

### Administrative Manager Job Description

**Administrative Manager Job Description**

Responsibilities:

* Maintaining attendance records;
* Assisting in purchasing, transportation, travel arrangements, and field trips;
* Performing scheduling duties;
* Collecting data required for the preparation of reports to the charter entity and other appropriate bodies;
* Answering phones;
* Welcoming parents, children, and guests to the school;
* Coordinating mailings and copying;
* Other duties, as assigned.

Qualifications:

* High school diploma or higher degree;
* Demonstrated organizational and writing skills;
* Prior experience in an administrative assistant position;
* Demonstrated ability to relate well to adults and children.

### Assistant Principal Job Description

**Assistant Principal Job Description**

**Responsibilities:**

* Adheres to and enforces board policy, school guidelines, and administrative directives.
* Supports the overall school improvement process including teacher observation, modeling best practice, and analyzing student data.
* Supports the implementation of Response to Intervention and monitors its continued implementation.
* Enforces guidelines to maintain proper discipline and conduct.
* Assists in the development and administration of policies dealing with discipline, conduct, and attendance.
* Communicates relevant policies and procedures with regard to student discipline, conduct, and attendance to students, staff, and parents.
* Assists the Principal with student expulsions.
* Works with and assists faculty in the development of effective classroom discipline and organization.
* Maintains an effective and safe school environment.
* Prepares required reports and paperwork such as discipline reports, suspension reports, expulsion paperwork, discrimination complaints, parent communications, and other paperwork as assigned.
* Assists in the selection and mentoring of staff.
* Supervises support services as assigned.
* Works as a team member to meet the system-wide needs of the district.
* Assists in supervision of special events.
* Performs other duties as assigned by the Principal or District Administrator

**Qualifications:**

* Master’s degree in an education
* Hold or eligible to hold appropriate Louisiana license.

### Dean of Students Job Description

**Dean of Students Job Description**

**Responsibilities:**

* Supervise the consistent and fair administration and tracking of student conduct and discipline data (merits/demerits);
* Contribute toward a safe environment for learning, including ensuring that student conduct is maintained and discipline is enforced fairly and consistently, and updating and implementing the required annual school safety report;
* Serve as liaison to parents and facilitate parent education and involvement, including reinforcing the need for parents to support the school’s policies and practices for student discipline, dress code, homework, and events;
* Coach teachers on classroom/ behavior management techniques;
* Assist in making formal reports to the board of trustees and charter entity on student conduct, school safety and related matters;
* Implement and follow policies and procedures for student dress code, discipline and other policies related to maintaining a positive school culture of learning and achievement;
* Facilitate faculty and staff development related to school culture and consistent enforcement of student discipline;
* Organize school events including open houses and parent conferences;
* Facilitate parent education and involvement, including reinforcing the need for parents to support the school’s policies and practices for student discipline, dress code, homework, and events;
* Undertake administrative and instructional duties as the principal may assign.

**Qualifications:**

* BA/BS degree or graduate degree;
* Administrative certification welcomed but not mandatory;
* Experience and demonstrated ability in working with children in a teaching, counseling or other applicable capacity (examples include, but are not limited to involvement with community youth organizations, supervisory roles in the Boy Scouts or Girl Scouts, and mentorships);
* Demonstrated successful teaching experience;
* Exhibited leadership in working with professional staff, students, and the community;
* Agreement with the academic goals and philosophy of the charter school;
* Commitment to accountability, including a rigorous student testing regime;
* Demonstrated success in encouraging parental involvement.

### Director of Curriculum, Instruction and Assessment Job Description

**Director of Curriculum, Instruction and Assessment Job Description**

**Responsibilities:**

* Provide leadership in the ongoing development, improvement, and evaluation of curriculum, instruction, and student data management;
* Responsible for coaching teachers on instructional delivery and methods;
* Assist Principal in developing staff development programming;
* Responsible for managing student data systems;
* Assist in administration of scheduling and standardized assessments;
* Assist Principal in the development of school created assessments;
* Serve as liaison to parents and facilitate parent education and involvement, including reinforcing the need for parents to support the school’s policies and practices for student discipline, dress code, homework, and events;
* Assist in making formal reports to the board of trustees and charter entity on student academic performance.

**Qualifications:**

* BA/BS degree or graduate degree;
* Administrative certification welcomed but not mandatory;
* Experience and demonstrated ability in working with children in a teaching, counseling or other applicable capacity (examples include, but are not limited to involvement with community youth organizations, supervisory roles in the Boy Scouts or Girl Scouts, and mentorships);
* Demonstrated successful teaching experience;
* Demonstrated organizational skills;
* Demonstrated ability in data management and presentation;
* Exhibited leadership in working with professional staff, students, and the community;
* Agreement with the academic goals and philosophy of the charter school;
* Commitment to accountability, including a rigorous student testing regime;
* Demonstrated success in encouraging parental involvement.

### Director of Finance & Accounting Job Description

**Director of Finance & Accounting Job Description**

**Responsibilities:**

* Coordinate all financial transactions, including revenue activities, expenditures, record keeping, reporting, auditing, district billing etc.;
* Coordinate all administrative transactions, including the provisions of personnel services, record keeping, reporting, inventory, purchasing, etc.;
* Coordinate the collection of any data required for the preparation of reports to the chartering entity and other appropriate bodies;
* Prepare materials in conjunction with the principal for board meetings;
* Serve as liaison to board finance committee and treasurer of the board;
* Manage facility maintenance and daily operations including custodial staff, student meal counts/ billing and student transportation.

**Qualifications:**

* BA/BS degree in related field or graduate degree;
* Demonstrated organizational skills;
* Demonstrated ability in data management and presentation;
* Prior experience in an operations manager position;
* Agreement with and commitment to the academic goals and philosophy of the charter school.

### Director of School Culture Job Description

**Director of School Culture Job Description**

**Responsibilities:**

* Driving implementation of school-wide behavior management and reward system
* Developing and implementing the rituals, routines, and celebrations that ensure a culture of academic success
* Developing and implementing professional development for staff to create and maintain a positive learning environment
* Ensuring a professional and college preparatory climate across all campuses
* Coaching and supporting administrators, counselors, and staff in driving our high achievement culture
* Developing and supervising mentoring opportunities within the school
* Developing systems and programs to support students that struggle with our high achievement culture
* Ensuring that all campuses maintain >95% daily attendance and timeliness
* Ensuring due process and legal compliance regarding all student disciplinary actions
* Maintaining and reporting school-wide attendance and discipline data
* Developing and implementing the rituals, routines, and celebrations that ensure a culture of academic success
* Ensuring all students are receiving high quality extra-curricular experiences
* Performs such other tasks and responsibilities as assigned by Lead Administrator

**Qualifications:**

* Bachelor’s degree.
* Results-oriented individual – a flexible thinker willing to do “whatever it takes”
* Belief in the school missions and model
* A ferocious desire to provide our students with an exemplary education.
* Five years experience in teaching, teacher coaching, or student support.
* Proficiency in Microsoft Excel, PowerPoint, Word and Outlook

### Director of Special Education Job Description

**Director of Special Education Job Description**

**Responsibilities:**

* Coordinates all special education programs within the ABR charter school portfolio
* Interprets and implements all state and federal special education requirements and mandates to ensure compliance
* In concert with school leadership and appropriate personnel, plans and implements professional development programs for special education, regular education personnel and parents.
* Supports the procurement of all federal and state special education grants.
* In concert with school administration, supervises and evaluates all special education staff and programs
* Responsible for system-wide student records system including compliance with appropriate laws and regulations
* Responsible for ensuring delivery of all of the services prescribed in the individual education plans of students enrolled at an ABR managed schools.

**Qualifications:**

* Masters Degree
* Certification as Special Education Administrator or eligible for certification
* Five years of teaching and/or supervision in the field of special education
* Working knowledge of Department of Education special education regulations

### Enrollment Coordinator Job Description

**Enrollment Coordinator Job Description**

**Responsibilities:**

* Establish presence in the community for outreach and recruiting purposes;
* Provide enrollment counseling for incoming students and families;
* Serve as liaison to parents and facilitate parent education and involvement;
* Counsel students and families through the appropriate application process for high school and/or college entrance;
* Assist students and faculty with student admission testing preparation, financial aid and completion of high school/college applications and essays when applicable;
* Establish rapport with local and regional high schools and/or colleges;
* Facilitate workshops and seminars about high school and/or college options.

**Qualifications:**

* BA/BS degree in education, counseling or related field;
* Demonstrated experience working with under-served or at-risk students;
* Demonstrated strong oral and written communication skills;
* Ability and willingness to travel;
* Demonstrated ability to exhibit strong interpersonal skills with students, parents and administrators;
* Demonstrated ability to facilitate workshops.

### Guidance School Counselor/Social Worker Job Description

**Guidance School Counselor/Social Worker Job Description**

**Purpose:**

* To promote and enhance the overall academic mission by providing services that strengthen home, school, and community partnerships and alleviate barriers to learning.
* To determine the needs and interests of students and present options for development both outside of school and within the school program to maximize the likelihood that students will achieve long-term goals and reach their maximum potential.

**Essential Functions:**

* Effectively and appropriately assess and address the needs, characteristics, and interactions of students, families, and community.
* Use knowledge and understanding of the reciprocal influences of home, school, and community to intervene for student success via such practices as assessment, crisis intervention, home visits, conflict resolution, individual and group counseling, consultation, program development, dropout prevention, and coordination of school and community services.
* Advocate for appropriate services for students and their families.
* Consult and collaborate with stakeholders on behalf of students and their families.
* Effectively plan, implement, and evaluate programs that promote student and family success.
* Use assessment and evaluation results to develop appropriate interventions for students, families, schools and communities.
* Develop long-term and short-term intervention plans consistent with curriculum, with students’ needs, strengths, diversity and life experiences, and with other social and emotional factors.
* Provide services to students in ways that build upon individual strengths and offer students maximum opportunities to participate in the planning and direction of their own learning experience.
* Provide appropriate follow-up to ensure that students’ needs are being met.
* Act as a point of contact for outside organizations working with students and their families.

**Requirements:**  
  
•    Master Level Licensed Social Worker  
•    5 years clinical experience   
•    Personal initiative and desire for responsibility  
•    Strong communication skills ability to work collaboratively with teachers/staff  
•    Leadership capacity  
•    Familiarity with the local community  
 **Terms of Employment:**  
Employment of this position is conditioned upon satisfactory completion of criminal background and criminal history check. Social Workers are at-will 12-month employees; benefits associated with this position are described in the employee handbook.

### Human Resource Manager Job Description

**Human Resource Manager Job Description**

**Responsibilities:**

* Serve client and employees, including teachers and school administrators, by handling day to day questions and helping resolve work-related problems.
* Assist in communicating company policies and procedures. Promote understanding within the organization and across the school operations.
* Recruit for open positions and perform the full life cycle of recruiting activities including sourcing and screening applicants, maintaining recruiting systems, drafting offer letters, providing follow-through with candidates, supporting hiring managers, and reporting recruiting statistics.
* Draft and update job descriptions; assist in classifying positions and/or reclassifying positions as needed.
* Lead employee on-boarding activities; answer employee questions and provide support to managers when integrating new hires into the organization.
* Implement fingerprint-supported background checks and teaching certification of all applicable employees.
* Administer employee benefit programs, answer employee questions, support claim resolution, and maintain related systems.
* Support the performance review process; provide employees and managers with information about the process, policies, job duties, and process for promotion.
* Lead employee recreation and recognition programs.
* Maintain employee records.
* Responsible for new hire, termination, and change of status forms with payroll. Serve as employee liaison to assist in problem resolution with issues related to benefit deductions and pay.
* Coordinate and ensure completion of employee exit interviews. Report outcome of exit interview information to management and tracks/maintains data.
* Ensure compliance with applicable employment laws and regulations.
* Other duties as assigned.

**Qualifications:**

* **Education and Experience**: Bachelor’s Degree in Business, Communication, Psychology, or other similar degree.
* **Preferred Skills and Work Experience**: Five to eight years previous work experience as an HR Generalist or Senior Generalist. School or education experience preferred.
* General knowledge of the principles and practices of personnel administration; ability to establish and maintain effective relationships with peers and employees; ability to present information and make recommendations effectively in oral and written form. Proficient computer skills and working knowledge of the Internet.
* Demonstrated ability to work under pressure and make deadlines.
* Demonstrates good judgment; approachable and professional; solid problem solving skills; ability to handle multiple tasks; self-motivated; well organized.

### Library Technology Specialist Job Description

**Library Technology Specialist Job Description**

**Responsibilities:**

* Select, order, maintain, and disseminate information in the library and virtual classroom to all faculty and students;
* Teach faculty and students how to use the resources available in the library and provide support for class projects and research;
* Teach faculty and students how to use instructional technology applications;
* Keep current with information, publications, technology, and formats used in the library;
* Maintain library records including: circulation, purchases, patrons, classes, and online access;
* Generate reports for budgeting, yearly statistics, needs assessment and other areas as needed;
* Give book-talks for classes, individual students, faculty, and staff;
* Participate in professional development opportunities to stay current in the field.

**Qualifications:**

* BA or BS degree in related field; Masters of Library Science degree, preferred;
* Demonstrated technology proficiency;
* Demonstrated strong oral and written communication skills;
* Ability and willingness to travel;
* Demonstrated ability to interact with students, parents and administrators;
* Experience working with urban school population as well as faculty and staff;
* Excellent communication and interpersonal skills.

### Principal Job Description

**Principal Job Description**

**Responsibilities:**

* Pursue the vision and Execute the mission of the school;
* As Head of School provide leadership and direction to staff (including Director of Finance and Operations, Director of Curriculum and Instruction, Director of School Culture, and other administrative staff, consultants, administrative assistant, and all teachers);
* Supervise and observe all instructional practices in the school, including coaching and mentoring directly or through other staff and/or professional development programs;
* Hire, evaluate, and terminate staff; except that such action with respect to the Director of Finance and Operations position shall be subject to review and/or approval by the Board of Trustees;
* Administer scheduling, enrollment and curriculum;
* Serve as liaison to the Board of Trustees, including providing formal and informal reports to the Board and charter entity;
* Prepare materials in conjunction with Director of Finance and Operations for Board meetings, including student academic achievement data based on comparative and longitudinal measures;
* Implement and follow policies and procedures;
* Provide a safe environment for learning;
* Ensure proper budgeting, accounting, auditing, and financial planning.

**Qualifications:**

* BA/BS degree or graduate degree;
* Administrative certification welcomed but not mandatory;
* Demonstrated successful leadership in a senior administrative position in a public or private school, preferably but not necessarily as a Head of School and preferably working with a board;
* Demonstrated successful teaching experience and other school roles, preferred in an urban education setting serving all-girls;
* Exhibited leadership in working with professional staff, students, and the community toward achieving goals;
* Agreement with and commitment to the academic goals and philosophy of the charter school, particularly the single-sex, all-female model;
* Demonstrated willingness to implement merit pay approach for teachers;
* Commitment to accountability, including a rigorous student testing regime;
* Experience or familiarity with data management and presentation and commitment to achieving for students academic goals;
* Demonstrated success in encouraging parental involvement.

### School Operations Manager Job Description

**School Operations Manager Job Description**

**Responsibilities:**

*Operational Functions:*

* Responsible for site level procurement of supplies, materials, equipment, and inventory management.
* Local manager for transportation, foodservices, facilities maintenance, security and other third party service contracts ensuring ongoing monitoring and implementation of contracts.
* Manage all aspects of free and reduced lunch program/process, including managing the entire application process.
* Coordinate technology implementation (planning, procurement, and training).
* Implement enrollment campaign for students (e.g., new students, intent to attend, waiting lists) including engagement in local marketing initiatives, demographic analysis, coordination with local/regional communications specialists.
* Oversee enrollment at school site and, as required, lead the enrollment process by working with the school leadership, secretaries, teachers and central enrollment department/advertising to meet enrollment targets.
* Work with school personnel to maintain integrity and accuracy of student records, including maintenance and tracking of attendance and retention.
* Work with school staff to manage reporting and data tracking for all special education programs.
* Prepare reports on site operations.
* Support all operational and logistical projects for start-up operations.
* Respond to and resolve routine internal and external inquiries with parents, employees and school organizations.

*Financial Administration Functions:*

* Responsible for site level budget monitoring and management, with input into budget development.
* Review monthly financial reports and update monthly financial estimate templates.
* Coordinate with the grant writers for all federal, state, and local grant application and reporting.
* Prepare drawdown requests for state funds.
* Manage and reconcile school's petty cash funds.
* Provide financial oversight, including invoice approval and developing the substitute teacher budget.
* Manage accounts payable and payroll processes.
* Oversee, in coordination with the controller, yearend audits as well as any site audits from state or federal agencies

*Human Resource Management Functions:*

* Manage day to day activities of designated non-instructional staff.
* Cooperate with Human Resources Manager to implement policies and procedures at school (e.g., compensation, vacation/sick days; recruitment screening, background checks, etc.).
* Oversee the processing of all new hire paperwork.
* Maintain personnel files for all employees.
* Lead orientation for new hires.
* Lead annual performance reviews for non-instructional staff.

**Qualifications:**

* **Education**: Bachelor’s Degree in Business, Accounting or Finance.
* **Preferred skills and work experience**:
  + Demonstrated success in monitoring budgets of $5 million.
  + Demonstrated success in managing contracts of up to $500,000.
  + Experience working in education organizations.
  + Experience with staffing processes and general human resource procedures.
  + Operations and facilities management experience.
  + Knowledge of financial modeling (using Excel) and cost analysis techniques.
  + Experience in managing and enforcing service level agreements and contracts for outsourced services.
  + Demonstrated ability to manage staff of 5-10 exempt and nonexempt employees.
* Demonstrates persistence in overcoming and removing obstacles to goal achievement.
* Demonstrates a drive, commitment and sense of urgency that inspires others to achieve results.
* Implements and monitors relevant work procedures in line with defined standards.
* Proactively approaches others with a view to engaging in dialogue and building strong working relationships.
* Recognizes people who may be of critical importance to achievement of one's objectives and involves them to get their input.
* Requests input from others to work towards a more effective outcome.
* Holds employees/colleagues accountable for achieving results and publicly acknowledges effective performance.
* Likes to multitask.

Demonstrates good judgment; approachable and professional; solid problem solving skills; self-motivated; well organized.

### Senior Accountant Job Description

**Senior Accountant Job Description**

**Responsibilities:**

* Oversee and manage financial activities of SOMs including procurement, food services, petty cash and school activity funds.
* Process payroll including managing the timesheet process and the financial pieces of benefits administration.
* Manage the entire accounts payable process including reviewing and approving purchase orders, approving payments, ensuring appropriate coding and working with site personnel to ensure all expenditures are in compliance with the operating budget, capital plans, contracts, and restricted funding sources.
* Run the monthly close process including recording month-end journal entries, accruing revenues and expenses, and updating balance sheet schedules.
* Support the Finance Director and the Regional VP, the annual budgeting process including working with the principals on scenarios and ensuring consistent budgeting assumptions.

**Qualifications:**

* **Education**: Bachelor’s Degree in Accounting or Finance; CPA or MBA preferred.
* **Preferred skills and work experience**:
  + Experience with education/governmental accounting or a corporate accounting group. Understanding of GAAP non-profit accounting.
  + Knowledge of payroll processing.
  + Experience with all aspects of the accounts payable process.
  + Demonstrated success in supervising and managing dotted-line reports.
  + Experience in managing financial processes, reading financial reports (and training others on how to do so) and presenting financial information.
  + Demonstrated ability in applying the understanding of those statements to corrective actions when necessary.
  + Experience in financial analysis including budget to actual analysis, ability to understand trends and forecast.
  + Knowledge of financial auditing so as to coordinate annual audits and yearend close process for individual sites.
  + Demonstrated ability to read and understand client contracts in order to understand and deliver on financial requirements.
  + Knowledge of grants so as to understand how grant dollars impact the budget and flow through the system.
  + Advanced knowledge of Excel.
  + Demonstrated ability in using financial/accounting software, with knowledge of QuickBooks preferred.
* Demonstrates ability to confront difficult issues head-on in a professional manner, offer solutions, and be ready to roll up their sleeves and contribute hands-on.
* Enforces and explains corporate policies and procedures and drives/guides expected behavior from others.
* Identifies opportunities to bring others together to share information; ensures people are supporting each other appropriately; encourages exchange of ideas.
* Proactively approaches others with a view to engaging in dialogue and building strong working relationships.
* Builds and nurtures rapport with the highest levels in client organizations and leverages these relationships effectively for the organization's advantage.
* Builds a shared understanding of goals and targets necessary for successful achievement of strategy in own area.
* Makes regular contact with clients (internal and external) to keep them informed and to learn of any new issues or challenges that can impact expected outcomes.
* Demonstrates ability to interact with clients and staff in a collaborative manner.
* Strong interest in education.
* Demonstrates ability to work independently.
* Record of strong follow through and responsiveness.
* Excellent interpersonal skills and ability to manage relationships.

### Special Education Coordinator & Special Education Teacher Job Description

**Special Education Coordinator & Special Education Teacher Job Description**

**Responsibilities:**

* Provide direct and indirect instruction;
* Long and short-term planning addressing individual needs of students;
* Evaluate students’ progress;
* Teach a multi-model approach;
* Provide an inviting, exciting, innovative, learning environment;
* Establish and maintain classroom management procedures;
* Prepare written reports accurately and submit in a timely manner;
* Effectively communicate with teachers, parents, and administrators to facilitate the IEP process;
* Effective consultation with parents, students, teachers, and administration;
* Effective professional liaison between school and home when necessary;
* Serve as advisors to students;
* Remain current on rules set forth in special education law and regulations (Coordinator position only);
* Maintain privacy of student records and information (Coordinator position only);
* Serve as primary liaison with CSE of students’ district of residence (Coordinator position only).

**Qualifications:**

* Appropriate state certification as a special education teacher and any other credentialing required and applicable;
* Demonstrated ability to communicate and work effectively with parents;
* Demonstrated ability to adapt to individuals specific needs;
* Demonstrated ability to adapt to differences and changes in characteristics of students, programs, leadership, staff, and community;
* Demonstrated ability to utilize varied teaching methodologies to accommodate students’ unique learning styles;
* Demonstrated ability to evaluate tests and measures of achievement;
* Demonstrated ability to work effectively as a team member;
* Demonstrated administrative or organizational ability (Coordinator position only).

### Student Information Manager Job Description

**Student Information Manager Job Description**

**Responsibilities:**

* Data Management: Audit data reports for compliance, ensure reliable reports can be created to meet applicable requirements, determine system protocol and standards (i.e. field labels and structure); ensure that regular backups of data are applied.
* Systems Development: Monitoring of the student information system and audit forcompliance with applicable requirements; implement recommendations and ensure that the system is flexible to meet user needs; incorporate user input and feedback to develop plans to enhance the system.
* User/Client Support: Anticipate and address user concerns; create viable solutions to meet business requirements; prepare and direct the training of users on the system.
* Team Management: Coordinate with school staff to facilitate smooth operations and processes when collecting and reporting on student information. Provide feedback, coaching and developmental opportunities to ensure the team's successful performance.
* Maintain confidentiality of student records.Work with School Operations Managers to understand their data needs and system requirements. Liaise with technology team to receive feedback on system and work together for problem solving.

**Qualifications:**

• **Education**: Bachelor’s Degree strongly preferred.• **Preferred skills and work experience**:

* Experience in K-12 education.
* 5-7 years of experience.
* Experience with information systems and databases.
* Experience translating business needs and requirements into information system.
* Knowledge of relational databases and data management processes.
* Ability to oversee and manage state mandated reports.
* Experience with developing standards and managing audits against standards.
* Experience with developing and delivering end user training on data systems.
* Staff management experience.
* Demonstrated managerial leadership experience of cross-functional teams.

• Demonstrates a strong sense of urgency through prioritizing and following through on commitments.

* Demonstrates the ability to implement and monitor relevant work procedures consistent with defined internal and external standards.
* Demonstrates a clear perspective on process flow components and how they interact.
* Demonstrates flexibility and ability to shift priorities to address changes in events or assigned goals.
* Strong interpersonal skills.
* Recognizes people who may be of critical importance to achievement of team objectives and involves them to get their input.

Seeks opportunities to share information for the benefit of others; seeks the input of others to encourage participation, both within and outside the team.

### Student Services Coordinator Job Description

**Student Services Coordinator Job Description**

**Responsibilities:**

* Provide students and families social work services;
* Provide small group seminar sessions to students regularly promoting positive social and emotional development;
* Provide small group and individual therapy sessions;
* Suggest and connect families with appropriate social services;
* Serve as the school’s Homeless Liaison;
* Maintain privacy of student records and information;
* Undertake administrative and instructional duties as the principal may assign.

**Qualifications:**

* BA/BS degree or graduate degree in Social Work; MSW preferred;
* Experience and demonstrated ability in working with children in a teaching, counseling or other applicable capacity (examples include, but are not limited to involvement with community youth organizations, supervisory roles in the Boy Scouts or Girl Scouts, and mentorships);
* Knowledge of local social services;
* Experience with individual goal writing, charting, and progress note taking;
* Exhibited leadership in working with professional staff, students, and the community;
* Agreement with the academic goals and philosophy of the charter school;
* Commitment to accountability, including a rigorous student testing regime;
* Demonstrated success in encouraging parental involvement.

### Teacher Job Description

**Teacher Job Description**

**Responsibilities:**

* Maintain and enrich their expertise in the subject area they will teach;
* Develop lesson plans that ensure the attainment of state learning standards and the additional specific grade-by-grade learning standards set forth in the charter;
* Coordinate lesson plans with other teachers to maximize possibilities for teaching similar topics in the same general time frame, thus reinforcing student knowledge on an interdisciplinary basis;
* Provide direct and indirect instruction;
* Long and short-term planning addressing individual needs of students;
* Prepare students adequately for all required assessments;
* Evaluate students’ progress;
* Prepare at least quarterly individual student achievement reports for parents;
* Provide an inviting, exciting, innovative, learning environment;
* Engage in effective and appropriate classroom management;
* Accept and incorporate feedback and coaching from administrative staff;
* Serve as an advisor to a students, including organizing advisory groups, overseeing the academic and behavioral progress;
* Perform other duties, as deemed appropriate, by the principal.

**Qualifications:**

* Demonstrated expertise in the subject they will teach, as evidenced by personal skills and knowledge, an undergraduate major or minor or graduate degree in the subject they will teach, or direct subject-area teaching experience;
* If not covered by any of the exemptions provided under New York’s charter-school law, possess any required state teaching certification and meet any other applicable credentialing requirements including the federal Elementary and Secondary Education Act, as amended;
* Demonstrated communication skills;
* Demonstrated ability and experience to engage the interest of school-age children;
* Demonstrated ability to work with diverse children, including those with special needs;
* Teaching experience in a public or private school, preferably in an urban setting;
* Demonstrated ability to work well with parents;
* Demonstrated ability to work effectively as a team member;
* Demonstrated ability to evaluate tests and measurements of achievement;
* Demonstrated willingness to be held accountable for student results.

### Technology Manager Job Description

**Technology Manager Job Description**

**Responsibilities:**

* Manage technology strategic plan and budget.
* Oversee infrastructure design (including multi-node LAN/WAN and telephony) and systems implementation.
* Work collaboratively with School District technology departments to manage and support appropriate shared technology services and applications.
* Communicate regularly with school administrators and leaders on school campuses regarding technology issues and concerns.
* Technology vendor RFP management, selection, negotiation and management.
* Set up help desk and asset tracking systems.
* Supervise User Support Technician for servicing users.
* Assist in identification, evaluation, and selection of educational and operational software.
* Develop and implement technology policies, practices and procedures.
* Lead telecommunications projects of strategic impact such as vendor RFP's, migrations across WAN, LAN, Voice and wireless/mobile platforms.

**Qualifications:**

* **Education**: College/technical degree or significant equivalent work experience required.
* **Preferred skills and work experience**:
  + Minimum of 5-7 years of technology leadership and management experience.
  + CCNP preferred, CCIE written and CISSP a plus.
  + Experience with layer 2 transport such as ATM, Frame Relay, Ethernet, Layer 3 services: MPLS/VPN routing protocols: OSPF, BGP, EIGRP.
  + Knowledge of network security tools, security practices as they pertain to telecommunications, DMZ's, VPN/RAS, Firewalls, IDS/IPS, NAC, MARS CSA, RADIUS; TACACS and a track record of maintaining solid audit posture.
  + Knowledge of existing network management tools and emerging tools, architectural concepts and principles.
* Ability to articulate and communicate complex technology concepts effectively in non-technical terms in a compelling manner;
* Ability to analyze complex business/technical problems to define system scope and objectives
* Strong analytical and problem solving skills and ability to manage a project independently.
* Strong documentation and oral, written and communications skills.
* Self-motivated team player, able to set priorities and manage to deadlines.
* Excellent trouble-shooting, communication and customer service skills.
* Exhibits a professional image and presence in making oral and written presentations.
* Superior project management skills, with strong ability to multi-task.
* Driven for results, with the ability to maintain a sense of urgency and commitment to the goal of achieving results on time and within budget.
* Team player with strong interpersonal and communication skills, high integrity and strong ability to take accountability and follow through.
* Should possess a belief in the power of education to change a child’s future.

### Time Out Room Moderator Job Description

**Time Out Room Moderator Job Description**

**Responsibilities:**

* Notify appropriate personnel and agencies immediately, and follow established procedures when there is evidence of substance abuse, child abuse, child neglect, severe medical or social conditions, potential suicide or individuals appearing to be under the influence of alcohol, or controlled substances.
* Establish a professional rapport with students and with staff that earns their respect.
* Serve as a role model for students, demonstrating the importance and relevance of learning accepting responsibility and demonstrating pride in the education profession.
* Meet with parents regarding student discipline issues.
* Provide and supervise in a fair and consistent manner the values, and mission of the school and district, in accordance with due process and other laws and regulations.
* File required reports regarding violence, vandalism, attendance and discipline matters.
* Display the highest ethical and professional behavior and standards when working with students, parents, school personnel, and agencies associated with the school.
* Maintain positive, cooperative, and mutually supportive relationships with the central administration, parents, and representatives of resource agencies within the community.
* Develop, implement and post Time Out Room procedures and expectations; supervise and maintain a strict environment in the Time out Room.
* Keep accurate documentation for all students that are encountered on a daily basis.
* Supervise daily lunch detentions.
* Supervise after school detentions.
* Supervise Saturday Detentions.
* Other duties as assigned.

**Qualifications:**

* Minimum High School Diploma
* Ability to demonstrate knowledge and understanding of curriculum development and program evaluation, child growth and development, effective instructional strategies, classroom management, and research of learning.
* Demonstrate excellent leadership and organizational skills.

## **New Hire**

### New Hire Process---Steps to follow

**Phase I**

1. School Principal will notify the School Operations Manager as soon as they have information regarding a vacancy or new position in their school.
2. The notification must be communicated to the Human Resources Department via the **Personnel Requisition Form PRF (see attached, form #1).**

When a resignation is involved, a copy of the resignation letter should be enclosed.

* The SOM and School Principal approve
* The SOM will submit the PRF to the Accounting Department.
* The Accounting Department will submit to HR for final approval.

Announcements of vacancies will be posted in all schools. Depending upon the circumstances, vacancies will be advertised in the local and/or area newspapers, or other media options.

**Phase II**

1. The school administrator follows the interview process for open position and makes decision to hire.
   * Please make sure the candidate has applied online.
2. SOM or school administrator completes **Request to Hire Form (please see attached, form #2).**
3. Once the form is completed send via email to email address
4. HR will complete the reference check, certification check and set salary. If satisfactory HR will contact candidate to schedule a new hire meeting which includes background check and a simple new hire orientation to ABR.
5. Once all documents are received by HR, we will send the SOM a **Clearance Form (please see attached, form #3)** that allows the employee to begin work.

* This process should take no more than 3 days from initial request to clearance.
* HR will keep you posted on the status of all new employees
* Please note that employees **will not be paid** on days worked before the clearance was received. Also, it is illegal to have an employee work without receiving pay. It is our number one priority to get teachers and staff working as soon as possible; however we must have documents in order to be compliant.

### New-Hire Orientation Checklist

**New-Hire Orientation Checklist**

School: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Hire: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |
| --- | --- | --- |
| **PRE-EMPLOYMENT DOCUMENTS** | **COMPLETED AND/OR REVIEWED BY** | **COMMENT** |
| Resume and Cover Letter |  |  |
| Application for Employment |  |  |

|  |  |  |
| --- | --- | --- |
| **GENERAL DOCUMENTS**  **TO BE COMPLETED BY NEW HIRE** | **COMPLETED AND/OR REVIEWED BY** | **COMMENT** |
| W-4, Federal Withholding Certificate |  |  |
| L-4, State Withholding Certificate |  |  |
| Direct Deposit Authorization Form |  |  |
| I-9 (along with copies of documents) |  |  |
| New Hire Form |  |  |
| Second Injury Employee Medical Questionnaire |  |  |

|  |  |  |
| --- | --- | --- |
| **DOCUMENTS TO BE GIVEN TO EMPLOYEE** | **DATE/BY WHOM** | **COMMENT** |
| Employee Handbook |  | Date receipt signed \_\_\_\_\_\_\_ |
| Pay Date List for Appropriate Year |  |  |
| Timesheet |  |  |
| Background Document |  |  |
| Instructions to View Payroll Data |  |  |

***PLEASE RETURN THIS CHECKLIST AND ALL COMPLETED FORMS TO HUMAN RESOURCES***

### New Hire Form

***PERSONAL DATA***

Employee’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Last First M.I.

Social Security #: \_\_\_\_\_ - \_\_\_\_- \_\_\_\_\_ Birth date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Marital Status: \_\_\_\_\_\_\_\_ Gender: \_\_\_\_\_\_\_\_\_\_\_\_ Race: \_\_\_\_\_\_\_\_\_\_\_

Home address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Number and street name Apartment #

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City State Zip Code

Home Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Cell Phone: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Personal e-mail address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

***EMERGENCY CONTACT INFORMATION***

***If you do not wish to provide emergency contact information, please write in your name, write a note that you do not wish to complete the form, sign and date the form.***

**PRIMARY CONTACT:**

Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Relationship: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Home number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Work Number:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Cell Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ E-mail: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

This information is confidential and will only be used in the event of an emergency. Please return this form to Human Resources.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_

Employee Signature Date

|  |
| --- |
| **Office Use Only:**  **School Name**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date of Hire:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  **Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Replacing/New:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **Approvals: School leader \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**  **S.O. M.: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |

## **Request for Absence/Leave**

|  |
| --- |
| **Reason Codes**  01 Sick Leave  02 Jury Duty  03 Family Illness  04 Personal Leave  05 Professional Leave  06 Unauthorized Absence  07 Administrative Leave  08 Military Leave  09 Assault Leave  10 Worker’s Comp. |

***Teacher Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

***Today’s Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

***Date(s) of Absence/Leave: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

***Reason Code for Absence/Leave: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***

***\*For Jury Duty, Military Leave, Assault Leave, or Worker’s Comp, documents confirming the need for this leave must be attached to this form.***

***\*For all ½ day and full day absences, please complete the Teacher Absentee Record.***

***For professional leave:***

***What is the purpose of the professional leave?***



***How will this leave benefit students, the school, and Advance Baton Rouge? (Also, attach an agenda or documentation that explains the nature of the professional leave.)***



***If the school is paying for this leave, are the following documents attached:***

***Travel Expenses***

***Hotel Expenses***

***Registration***

|  |
| --- |
| **For Administration Only** |
| ***Received By:*** |
| ***Approved/Disapproved:*** |
| ***Reason for disapproval of leave:*** |

## **Sexual Harassment Policy**

**Sexual Harassment Policy**

All individuals associated with this School, including, but not necessarily limited to, the administration, the staff, and students, are expected to conduct themselves at all times so as to provide an atmosphere free from sexual harassment.

Sexual harassment includes unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when made by a member of the School staff to a student or to another staff member, or when made by a student to another student where:

Submission to such conduct is either explicitly or implicitly made a term or condition of an individual's employment or education; or

Submission to or rejection of such conduct is used as a basis for employment or education decisions affecting such individual; or

Such conduct has the purpose or effect of substantially interfering with an individual's educational or work performance, or creating an intimidating, hostile, or offensive employment or education environment.

Sexual harassment may include, but is not limited to:

Suggestive or obscene letters, notes, invitations, derogatory comments, slurs, jokes, epithets, assault, touching, impeding or blocking movement, leering, gestures, or display of sexually suggestive objects, pictures, or cartoons.

Continuing to express sexual interest after being informed that the interest is unwelcome. (Reciprocal attraction between peers is not considered sexual harassment.)

Implying or withholding support for an appointment, promotion, or change of assignment; suggesting that a poor performance report will be prepared; suggesting that probation will be failed; implying or actually withholding grades earned or deserved; or suggesting that a scholarship recommendation or college application will be denied.

Coercive sexual behavior used to control, influence, or affect the career, salary, and/or work environment of another employee; or engaging in coercive sexual behavior to control, influence, or affect the educational opportunities, grades, and/or learning environment of a student.

Offering or granting favors or educational or employment benefits, such as grades or promotions, favorable performance evaluations, favorable assignments, favorable duties or shifts, recommendations, reclassifications, etc., in exchange for sexual favors.

Anyone who is subject to sexual harassment, or who knows of the occurrence of such conduct, should inform the compliance officer.

A substantiated charge against a staff member shall subject such staff member to disciplinary action.

A substantiated charge against a student shall subject that student to disciplinary action, which may include suspension or expulsion.

All matters involving sexual harassment complaints will remain confidential to the extent possible.

### Sexual Harassment Complaint Form

Basic Info: (Please print)

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Address \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Telephone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Alternate phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Best time to reach you \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Complaint against: (Name of person, school, department, program, or activity)



Date of complaint \_\_\_\_\_\_\_\_\_\_\_\_\_

Specify your complaint by stating the problem. Describe the incident, participants, background, and any attempts you have made to solve the problem. List relevant dates, times, and places:



Bottom of Form

List names of others who can provide more information: (Name, address, telephone)

Top of Form



Bottom of Form

The projected solution: (Indicate what you think should be done to solve the problem. Be specific)

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“I certify that this information is correct to the best of my knowledge.”

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of complainant Date

## **Teacher Evaluation**

### Components of Effective Teaching Observation Report

|  |  |  |
| --- | --- | --- |
| **Teacher:** | | **School:** |
| **Date:** | **Grade Level:** | **Subject:** |

Class Size\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Highlight 0-3 or 4+ Yrs Length of Observation\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Pre-Observation Conference Post Observation Conference

**Criteria: E – Exceeds M – Meets P- Progressing DM – Does Not Meet NA – Not Applicable**

**Planning –** Demonstrates competence in planning and preparing for instruction

**Criteria: E M P DM NA**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| a. Utilizes state standards, and the school curriculum in planning for projects |  |  |  |  |  |
| b. Driving questions focus on enduring understanding |  |  |  |  |  |
| c. Uses students’ data to plan differentiated activities |  |  |  |  |  |
| d. Includes explicitly taught and assessed by project work or that will be encouraged by 21st Century skills |  |  |  |  |  |
| e. Method of assessment identified |  |  |  |  |  |
| f. Identify resources including technology as needed for projects in the development and sequencing of the project |  |  |  |  |  |
| g. Identify activities that lead students to answering the driving questions |  |  |  |  |  |

**Comments:**

Top of Form



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**II - Classroom Climate –** Provides an atmosphere conducive to learning consistent with school mission.

**Criteria: E M P DM NA**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| a. Promotes a safe and positive learning environment |  |  |  |  |  |
| b. Creates a learning community that encourages positive social interaction and self-reflection by students |  |  |  |  |  |
| c. Manages classroom transitions and projects in a timely and orderly fashion |  |  |  |  |  |
| d. Establishes procedures and rules that support high expectations for student behavior |  |  |  |  |  |
| e. Promotes high expectations for student/group performance and/or presentation of quality work |  |  |  |  |  |
| f. Treats students in a fair and equitable manner |  |  |  |  |  |

**Comments:**

Top of Form



**III – Instructional Management–** Organizes teaching strategies to maximize the use of allocated instructional time to increase student learning.

**Criteria: E M P DM NA**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| a. An agenda posted with instructional activities identified |  |  |  |  |  |
| b. Reviews previous materials and/or activities as appropriate |  |  |  |  |  |
| c. Students working collaboratively in groups |  |  |  |  |  |
| d. Students assigned authentic work that is developmentally appropriate |  |  |  |  |  |
| e. Incorporates higher level thinking skills and encourages students to express ideas clearly and accurately |  |  |  |  |  |
| f. Directs and adequately supervises students to be on task quickly at the beginning of each instructional activity |  |  |  |  |  |
| g. Maximizes student time-on task in groups and/or independently |  |  |  |  |  |
| h. Forms effective transition between instructional activities |  |  |  |  |  |
| i. Engages students in activities that involve real-life connection, and prior knowledge and experience |  |  |  |  |  |
| j. Demonstrates flexibility in adjusting instruction when appropriate |  |  |  |  |  |
| k. Integrates a variety of technology applications and learning tools to enhance student achievement |  |  |  |  |  |
| l. Demonstrates ability to communicate effectively with students |  |  |  |  |  |

**Comment:**

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**IV - Instructional Content Knowledge –** Demonstrates competence in content knowledge appropriate to subject(s) taught

**Criteria: E M P DM NA**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| a. Presents accurate content at a developmentally appropriate level |  |  |  |  |  |
| b. Content is rigorous and relevant |  |  |  |  |  |
| c. Content is consistent with the LCC |  |  |  |  |  |
| d. Relates relevant real-life examples and/or current events to the content |  |  |  |  |  |
| e. Answers questions correctly and/or direct students to additional resources |  |  |  |  |  |
| f. Integrates subject content appropriately for projects |  |  |  |  |  |
| g. Understands and uses various instructional strategies that are appropriate to the content areas |  |  |  |  |  |

**Comment:**

Top of Form



**V – Student Progress –** Demonstrates the ability to monitor, assess and facilitates student academic achievement

**Criteria: E M P DM NA**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| a. Consistently monitors and evaluates student performance |  |  |  |  |  |
| b. Uses appropriate and effective assessment techniques (i.e. rubrics, formative and summative assessments, etc) |  |  |  |  |  |
| c. Provides timely feedback to students regarding their progress |  |  |  |  |  |
| d. Maintains accurate and complete student records |  |  |  |  |  |
| e. Follows grading policies and regulations |  |  |  |  |  |
| f. Monitors student attendance |  |  |  |  |  |

**Comment:**

Top of Form



**VI – Professional Work Habits –** Demonstrates behavior which reflects professional responsibilities

**Criteria: E M P DM NA**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| a. Adheres to established laws, policies, school procedures, rules and regulations |  |  |  |  |  |
| b. Demonstrates professional and ethical conduct as defined by state law and school policy |  |  |  |  |  |
| c. Interacts appropriately with students, parents and other personnel |  |  |  |  |  |
| d. Punctual with reports, grades, records and in reporting to work |  |  |  |  |  |
| e. Leads by example in appearance, manners, behavior and language |  |  |  |  |  |
| f. Teacher’s Professional Growth Plan is in place |  |  |  |  |  |
| g. Participates in activities that foster professional growth |  |  |  |  |  |
| h. Performs additional duties as requested |  |  |  |  |  |

**Comment:**

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**VII – Community Involvement –** Establishes relationships with stakeholders (parents, community and colleagues)

**Criteria: E M P DM NA**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| a. Provides clear and timely information to parents/guardians and colleagues regarding classroom expectations, student progress and ways they can assist learning |  |  |  |  |  |
| b. Encourages parents/guardians to become active partners in their children’s education and to become involved in school and classroom |  |  |  |  |  |
| c. Seeks community involvement in instructional programs (i.e. guest speakers, field trips, etc) |  |  |  |  |  |
| d. Utilizes the downtown community as a learning tool to engage students |  |  |  |  |  |

**Comment:**

Top of Form



**VIII – Technology Competency** – Demonstrates knowledge in the implementation of technology to improve student achievement

**Criteria: E M P DM NA**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| a. Demonstrates a sound understanding of technology operations and concepts |  |  |  |  |  |
| b. Plans and designs effective learning environments and experiences supported by technology |  |  |  |  |  |
| c. Implements curriculum plans that include methods and strategies for applying technology to maximize student learning |  |  |  |  |  |
| d. Utilizes the downtown community as a learning tool to engage students |  |  |  |  |  |
| e. Applies technology to facilitate a variety of effective assessment and evaluation strategies |  |  |  |  |  |
| f. Understands the social, ethical, legal and human issues surrounding the use of technology in schools and applies that understanding in practice |  |  |  |  |  |

**Comment:**

Top of Form



### Walk Through Teacher Observation

Teacher: Time:

Course: Date:

|  |
| --- |
| **CLASSROOM ENGAGEMENT** |

□ Student Centered/Dominated □ Student/Teacher Dominated □ Teacher Directed/Dominated

□ Cooperative Grouping □ Lecture/Whole Group Instruction □ Independent/Hands-On Activity

Comments/Supporting Evidence:

Top of Form



Bottom of Form

**RATINGS**

**E = Excellent S = Satisfactory NI = Needs Improvement N/A = Not Applicable**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **E** | **S** | **NI** | **N/A** |
| Agenda displayed and/or daily goal posted |  |  |  |  |
| Directions given and repeated as needed |  |  |  |  |
| Effective classroom management/discipline |  |  |  |  |
| Teacher monitoring/assessing |  |  |  |  |
| Environment conducive to learning |  |  |  |  |
| Effective use of instructional strategies |  |  |  |  |
| Maximum use of instructional time |  |  |  |  |
| Positive motivation/praise used |  |  |  |  |
| Use of Real-Life connections/experiences |  |  |  |  |
| Use of Technology |  |  |  |  |
| Students know the essential/driving question |  |  |  |  |
| Students actively engaged |  |  |  |  |
| Meaningful and purposeful student discussions |  |  |  |  |
| Respectful/supportive interactions between students and between students and teachers |  |  |  |  |
| Use of Differentiated Instruction |  |  |  |  |
| Bloom’s Taxonomy Level (circle)  Evaluation Synthesis Analysis Application Comprehension Knowledge |  |  |  |  |

Comments/Supporting Evidence:

Top of Form



Bottom of Form

Observer Signature Date

Observee Signature Date

## **Termination**

### Termination Process

**SOM Responsibility**

* If an employee quits or is terminated without notice, collect all equipment, if possible, (keys, roll book, grade book) and complete PAF (separation portion) and send to HR immediately.
* If an employee turns in future resignation, HR will collect equipment. Complete PAF (separation portion) and send to HR immediately.
* Complete personnel requisition form (for replacement position) and send to Accounting for approval process.

**Principal Responsibility**

* Notify HR and SOM immediately after being informed that an employee is resigning or terminated
* Notify HR and SOM immediately of equipment, school items (keys, roll book, grade book etc.) that the employee should return before receiving final payroll check.

**Accounting Responsibility**

* After receipt of PAF, calculate final pay
* Delete direct deposit and send paper check to school’s central office

**HR Responsibility**

**Complete the following:**

* **Complete PAF and send to payroll Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Request resignation letter Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Complete Exit Interview Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Collect school items Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
  + - **Roll Book**
    - **Grade Book**
    - **School keys**
    - **Other (please list) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Terminate in JPAMS Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Terminate in Paychex Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Terminate LEADS access Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Terminate Employee Benefits Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Notify helpdesk (email, web access)Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Submit term to DOL Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Submit term to state Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Personnel file to term cabinet Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**
* **Issue Final paycheck (paper form) Date:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ By:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

### Termination Letter

Date

Name

Street Address

City, St Zip

Dear XXXXX,

This letter represents formal notice that School Name has eliminated your position as a Position Title effective Date

Your final pay will be mailed to you at the current address on file for days worked Date through Date on Date. *In addition, you will be paid two (2) weeks’ severance payable on Date less any days taken that has not been accrued*. This payment shall be subject to applicable payroll taxes and withholding in accordance with federal, state and local law.

Please refer to your signed offer letter that information you obtain while employed with Mentorship Academy is confidential and proprietary to School Name or to its affiliated schools including, but not limited to, any trade secret, any financial, educational, fundraising, student, and/or personnel files, records and/or information (collectively “Confidential Information”), and that disclosure of any Confidential Information would cause irreparable harm to Mentorship Academy and its students. You agree not to communicate, divulge, or disclose to any other person, firm, or entity or use for your own benefit or purposes, any Confidential Information, except as required by law or court order or expressly authorized in advance in writing by to School Name .

Your benefits will end on Date. You will receive information on continuing your benefits from our COBRA administrators.

If you have questions regarding this letter, please contact me at phone number.

Sincerely,

HR Director’s Name

Human Resources Director

### Exit Interview Form

**Exit Interview Form**

We appreciate your willingness to take some time and thoughtfully complete this exit interview form. Through your feedback, you will provide Charter School Name with valuable information that will give us insight into current policies, practices, culture, etc., of the organization and help us to grow.

Your Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Today’s Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Last day with School Name: \_\_\_\_\_\_\_\_\_\_\_\_\_

1. What is your main reason for leaving? (e.g., end of contract, found other position, etc.)

Top of Form



Bottom of Form

1. Are there any other reasons for your leaving?

Top of Form



Bottom of Form

1. What did you find most satisfying about your job?

Top of Form



Bottom of Form

1. What did you find most frustrating about your job?

Top of Form



Bottom of Form

1. Were there any policies or procedures that made your work more difficult?

Top of Form



Bottom of Form

1. What additional responsibilities would you have welcomed that you were not given?

Top of Form



Bottom of Form

1. How would you describe the culture or “feel” of the organization?

Top of Form



Bottom of Form

1. What could you say about communications and relations between departments and how these could be improved?

Top of Form



Bottom of Form

1. What can we do to retain its best people?

Top of Form



Bottom of Form

11. What is your opinion of our compensation and benefits package?

Top of Form



Bottom of Form

1. Would you consider working again for us if the situation were right?  
   
2. Would you recommend us to a friend as a good place to work?  
   
3. Do you have any other comments?  
   

Top of Form

**PART THREE: OPERATIONS**

# Operations

## **Forms**

### Classroom Safety Checklist

Staff Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Building: \_\_\_\_\_ Room #:\_\_\_\_\_Date: \_\_\_\_\_\_\_\_\_\_\_\_

Assessment Conducted By: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Instructions:**

1. Check YES or NO for each of the following items. Skip any that do not apply.
2. Go back and circle each NO; these are the items that you have identified as dangerous to you and your class.
3. For each NO, suggest a way to remove the danger (use the comments space).

**YES/NO**

|  |  |
| --- | --- |
|  | Are desks and tables located where they cannot slide and block exits? |
|  | Are tall file cabinets securely attached to the wall or out of the way from toppling on anyone? Are the heavy items on top of the file cabinets restrained? |
|  | Do file cabinet doors have latches? Are the drawers securely closed? |
|  | Are computers out of the way if a monitor falls over? |
|  | Are storage spaces secured to the wall or attached to each other? |
|  | Are display cases protected against overturning or sliding off tables? |
|  | For freestanding equipment on wheels, are they all secured against overturning or sliding (ex. TV straps)? |
|  | Is freestanding equipment protected against rolling or falling over? |
|  | Are all heavy, sharp, or breakable wall decorations securely mounted, with closed eye hooks, for example? |
|  | Do books or materials stored on shelves have adequate restraints to keep them from falling off the shelves? Are heavy items on lower shelves? |
|  | Are fire extinguishers securely mounted and easy to access? |
|  | Are all your outlets covered so that internal wires are not visible? |
|  | Are wires or other tripping hazards out of the way of walkways? |

**Comments:**



**If you see any other hazards not included on this list, please specify them here:**



### Disciplinary Action Form

To the parent/guardian of:

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

Address: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SS#:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Regular Ed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Special Ed: \_\_\_\_\_\_\_\_\_\_\_\_\_

Phone Number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date parent was notified and how: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**In accordance with R.S. 17:416, your child:**

* Has been assigned to after-school detention for a period of \_\_\_\_\_\_\_\_\_\_ days.
* Is being suspended from school for a period of \_\_\_\_\_\_\_\_\_\_ days.
* Has been placed on parent-conference suspension and cannot return to school until a parent/legal guardian has a conference with a school administrator.

**The reason(s) for the action taken include:**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Your child:**

* Has been recommended for expulsion pending a hearing. You will be contacted with the date of the hearing. Parents have the right to request to view all of the evidence to be presented by the school at the expulsion hearing.
* Can return to school after the last suspension date. The suspension will start on \_\_\_\_\_\_\_\_\_\_\_\_\_\_ and end on \_\_\_\_\_\_\_\_\_\_\_\_\_. Your child can return to school on \_\_\_\_\_\_\_\_\_\_\_\_\_. Educational services will be provided to your child by the school from 5pm to 7pm during this period of time.
* Can return to school after a parent has a conference with a school administrator.
* Must complete after-school detention days (from 5pm to 7pm) or a 3 day suspension will be given. After school detention will start on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ and end on \_\_\_\_\_\_\_\_\_\_\_\_\_\_.

For after-school detentions and suspensions, your child must wear their school uniform, report on time, stay until \_\_\_\_\_\_\_\_, refrain from talking or eating during the detention/suspension session, refrain from sleeping, and complete all school work given to them.

We regret that it has been necessary to take disciplinary action. If you desire further information concerning this matter, you may contact the school at \_\_\_-\_\_\_-\_\_\_\_.

Sincerely,

### End of the Year Checkout List

**Teacher Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |  |  |
| --- | --- | --- | --- |
| **Task:** | **Complete By  (end of day):** | **Signed-off By:** | **Initials:** |
| Remove all materials from the walls |  |  |  |
| Box personal items and place on top of desk |  |  |  |
| Clean Classroom and Desks |  |  |  |
| Submit all text books, teacher’s editions, workbooks, etc. to the library (see schedule) |  |  |  |
| Submit Failure Lists |  |  |  |
| Submit up to date roll book (attendance and grades section) |  |  |  |
| Enter Student Grades |  |  |  |
| Box and label classroom materials (stapler, tape dispenser, hole punch, scissors, etc.) (room off S. Williams’ office) |  |  |  |
| Box and label teaching aides and materials (room off S. Williams’ office) |  |  |  |
| Submit Room Inventory Form |  |  |  |
| Submit Student Placement Forms |  |  |  |
| Complete Summer Contact Info Form |  |  |  |
| Return all Keys (classroom, closets, file cabinets, etc. – must be labeled) |  |  |  |
| Turn in Audio Visual Equipment (tv, dvd, vcr, etc.)to Library (see schedule) |  |  |  |
| Turn in LCD Projectors to library (see schedule) |  |  |  |
| Turn in ELMO to library (see schedule) |  |  |  |
| Turn in Overhead Projector to library (see schedule) |  |  |  |
| \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Principal’s Signature Date SOM’s Signature | | | |

## **REQUEST FOR PROPOSALS (“RFP”) CUSTODIAL AND FACILITIES MANAGEMENT SERVICES**

Interested parties shall respond to this RFP by submitting proposals as soon as possible to:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   
School Name School Address School City, State, Zip

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_reserve the right to reject any and all qualification statements, to cancel this solicitation, and to waive any informalities or irregularities in procedure.

**Introduction**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_is soliciting proposals from offerors having specific interest and qualifications in the areas identified in this solicitation. Qualification statements and proposals for consideration must contain evidence of the offeror's experience and abilities in the specified area and other disciplines directly related to the proposed work. Other information required by \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_includes the submission of profiles and resumes of the staff to be assigned to the projects, references, illustrative examples of similar work performed, and any other requested information which will clearly demonstrate the offeror’s expertise in the area of this solicitation.

A selection committee will review and evaluate all qualification statements and may request offerors to make oral presentations. The selection committee will rely on the qualification statements in selection of finalists and, therefore, offerors should emphasize specific information considered pertinent to this solicitation and submit all information requested.

**Project Description**

Offeror should be able to provide custodial services, facilities management services, and groundskeeping services.

Sites may include

[ ]

[ ]

Vendors are encouraged to bid for the entire facility program that includes services for all sites, but may also bid for any number of sites including only one. Bids must include custodial, facility and ground maintenance services.

Services may include the following:

1

(i) Daytime and evening custodial services, including thorough cleaning of designated areas and cleaning procedures on a frequency to be agreed in writing.

(ii) Project work on a scheduled basis, to be agreed in writing.

(iii) Summer cleaning as specified, including deep cleaning of each area.

(iv) Provision of all equipment and supplies required to fulfill custodial responsibilities, and uniforms for staff.

(v) Supply and replenishment of bathroom soap and paper.

(vi) Groundskeeping of entire site, including grasscutting and provision of required equipment.

(vii) Procurement of SchoolDude work order tracking system and management and maintenance of work order system, potential through operation of a call center or help desk.

(viii) Weekly reporting on work order status and measures to reduce backlog, if any.

(ix) Preventative maintenance of equipment. Major capital repairs will be excluded from Services.

(x) 24/7 emergency response availability.

• The form of contract is attached to this RFP. Any exceptions to the attached form of contract should be identified

**Qualification Statement Requirements**   
The offeror shall provide the following information organized as follows in their qualification statement:

1. A brief discussion of the firm, its organization, and services offered;
2. Information which demonstrates experience and history of providing said service as identified in this solicitation;
3. Description of staff training programs; and
4. Proposed team and qualifications and experience of team members; knowledge and experience of team members with respect to charter school organizations and the project description above.

**Proposal Requirements**   
Offerors shall submit the following in addition to qualifications:

1. Proposed scope of services.
2. Proposed fee and fee structure.
3. Hourly billing rates for assigned team members, if appropriate
4. Budget hours and cost by day, week, month.
5. Example certificate of insurance, demonstrating

**Timeline**

The deadline for submission of proposals is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ . Proposals may be submitted electronically to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_or in hard copy format to the address below:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
School Address  
  
 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_   
School City, State, Zip

**Additional Information**

For further information regarding this request, please contact \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_email   
\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_or call \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

## **Equipment**

### 

### Copy Machine

Copy machine codes are assigned by the School Operations Manager. Each teacher is given 2,000 copies a month. Additional copies must be approved by the School Leader and School Operations Manager.

### Textbooks

If a teacher is in need of a textbook they should submit the attached Textbook Request form to the Director of Curriculum and Instruction. Once approved, this form will be turned over to the School Operations Manager for distribution.

At the end of every semester teachers should turn in all textbooks to the School Operations Manager so that a proper inventory can be made.

# 

## **Field Trip Procedures**

1. Complete field trip requisition form to receive approval for field trip.
2. Once field trip is approved request any funds that will be needed. All requests for field trip funds must be made ***2 weeks in advance prior to field trip****.*Requesting funds as early as possible ensures that a check will be cut in time for a trip.
3. When requesting funds for trip, documentation is required to show use of funds. (Price sheet from venue, email with information indicating the cost of everything requesting etc.)
4. Complete lunch form for bag lunches if required. Request must be ***2 weeks in advance notice is required. NO EXCEPTIONS!!***
5. Send permission slips home with students attending field trip 1 week in advance prior to the date of trip. **NO STUDENT IS ALLOWED TO LEAVE CAMPUS WITHOUT SIGNED PERMISSION SLIP. NO EXCEPTIONS!!**
6. Make a copy of all permission slips for the front office, as well as for your records. These copies should be taken on the trip, so that emergency contact information is easily accessible.
7. Before boarding the bus, student attendance must be taken using permission slips. Student cannot board bus without a permission slip.
8. During the course of the trip, roll should be taken of all students attending the trip.
9. A student buddy system should be arranged before leaving campus. This will ensure everyone stays together and returns safe.
10. In the event of an emergency, (accident, student injured etc.) the teacher is responsible for contacting the school to report the incident. In an immediate emergency, the teacher should contact 911, school, then parent. This will ensure everyone is aware of the incident.
11. It is the teacher’s responsibility to stay on schedule in order to return to school by evening dismissal.
12. If the bus will not be back at school in time for evening dismissal, teacher should contact the school immediately to inform the Operations Manager that they will not arrive in time for evening dismissal. Further instruction will be given at that time on how to proceed with transporting students home.
13. Any items purchased with school funds (check, cash etc.) must be accompanied with a receipt of purchase.
14. All receipts should be turned in to the Operations Manager no later than the next business day.
15. Any excessive cash from the trip should be turned in to the Operations Manager no later than next business day.

**Field Trip Request Form  
  
A two (2) week advance notice is required for ALL field trips**

**Instructions:**1. Complete and submit this form to the school **two (2) weeks in advance.**  
2. Complete the Field Trip Permission Form and send home with students. The teacher must receive this permission form back from the student signed by his/her parent or guardian in order to attend.  
3. If the field trip requires payment, all students must pay and should return the consent form with exact change or check. Please collect from all students and turn in to the school along with the Check Request Form **one (1) week in advance.**  
4. If bagged lunches are needed, complete the Request Bag Lunch Form and submit to the Cafeteria Manager **two (2) weeks in advance.**

**Date of Request**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
   
**Requested By**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
**Number of Students**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
**Date of Field Trip**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
**Grade/Class Attending**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
**Number of Chaperones**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Please specify the destination arrival time and departure time.**

**Field Trip Start Time**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Field Trip End Time**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Destination**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
**Address**: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
   
 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Field Trip Permission Form** Your child will be attending a field trip to: | | | | | | |  | | | | | | |
|  | | | | | | | | | | | | | |
| Date: | | |  | | | | Time: |  | | | | | |
| Location: | | |  | | | | | | | | | | |
| Cost: | | |  | | | | | | | | | | |
| Transportation: | | |  | | | | | | | | | | |
| Notes: | | |  | | | | | | | | | | |
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|  | | | | | | | | | | |
|  | | | | | | | | | | |
|  | | | | | | | | | | | | | |
| Please return this permission slip by: | | | | | |  | | | | | | | |
|  | | | | | | | | | | | | | |
|  | | | | | | | | | | | | | |
| I give permission for my child | | | | |  | | | | |  | |  |
| to attend the field trip to | | | | |  | | | | on |  | |  |
| from | | |  | | to |  | | | | | |  |
| Enclosed is $ | |  | | | to cover the cost of the trip. (Exact cash or check made payable to school.) | | | | | | | | |
| In case of an emergency, I give permission for my child to receive medical treatment. In case of such an emergency, please contact: | | | | | | | | | | | | | |
| Name |  | | | | | | | | | Phone: |  |  | |
| Parent/Guardian Signature | | | |  | | | | | | Date: |  |  | |
|  | | | | | | | | | | | | | |

# 

## **Request Bag Lunches Form**

A **two (2) week** advance notice is required. Requests for bag lunches served during the month of May must be submitted by the last day in April.

The day before the trip, the teacher must confirm the number of bag lunches with the cafeteria manager. In order for student meal accounts to be debited, a list of names and POS #’s must be given to the manager.

Today’s Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
Date Lunches Needed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
Number of Lunches Needed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
Teacher’s Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
Time Lunches Needed: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Number and Type of Milk Needed:**

\_\_\_\_\_Low Fat Chocolate \_\_\_\_\_Low Fat White \_\_\_\_\_Whole Milk \_\_\_\_\_Skim Milk  
  
**A teacher or parent must provide and ice chest and ice in order to transport the milk.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Student’s Name** | **POS #** | **Student’s Name** | **POS #** |
|  |  |  |  |
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## **Staff/Student Interaction Policy**

**I. PURPOSE**

While incidences of sexual misconduct committed by teachers and school staff throughout the country are very low, every incident results in consequences so tragic that the incident is perceived by almost everyone as inconceivable. It is the purpose of this policy to provide additional specificity to the standards of conduct embodied in current ethics-related rules and regulations so that the staff of this school will better understand the prohibitions and behavior boundaries incumbent upon them. The rules of conduct set forth in this policy are not intended to serve as an exhaustive treatment of requirements, limitations, or prohibitions on staff conduct and activities established by this school.

Rather, they are intended to:

1. Alert staff to some of the more sensitive and often problematic matters involved in faculty/staff student relationships;
2. Specify boundaries related to potentially sexual situations and conduct that is contrary to accepted norms of behavior and in conflict with duties and responsibilities of staff, and
3. Provide staff with clear guidance in conducting themselves in a manner that reflects high standards of professionalism.

It is important to maintain a school-wide culture in which students and staff understand their responsibility to report sexual misconduct without fearing that school leaders will betray them if they do.

In order to prevent sexual abuse and exploitation, students and staff must know that the administration will support them when they report possible misconduct.

**II. INTRODUCTION**

Actions by staff that are inconsistent or in conflict with the values established by the school negatively affect the reputation of the school, the community and its employees. Such actions and inactions thereby detract from the school’s ability to effectively educate students. They endanger maintenance of the charter while diminishing both school’s ability to act as a strong asset to the community, and to conduct other essential business. Therefore, it is the policy of this ABR School that all employees conduct themselves at all times in a manner that reflects the ethical standards consistent with the rules contained in this policy and otherwise disseminated by this school.

This policy is intended to guide all faculty and staff in conducting themselves in a way that reflects the high standards of behavior and professionalism required of school employees and to specify the boundaries between students and staff. The school administration is committed to ensuring that its employees are considered innocent until proven guilty and that any investigation of an incident will be of the highest quality. False allegations of misconduct can be devastating to a staff member and the entire school. As such, it is vital that school administrators equip staff with a policy that clarifies acceptable and unacceptable behavior with students.

It is also crucial that staff study this policy thoroughly so they behave in ways that avoid even the appearance of misconduct. While all boundaries and/or situations cannot be addressed in a single policy, the issues discussed here are among those that are known to have been troubling for staff and are among the most sensitive in terms of their impact on schools and the community. Employees should seek guidance available through policies, procedures, and directives, as well as through the guidance and recommendations of school leadership.

Although this policy gives specific, clear direction, it is each staff member's obligation to avoid situations that could prompt suspicion by parents, students, colleagues, or school leaders. One viable standard that can be quickly applied is for you to ask yourself, “Would I be doing this if my family or colleagues were standing next to me?”

**III. BOUNDARIES**

**Boundaries Defined**

For the purposes of this policy the term “boundaries” is defined as acceptable professional behavior by staff members while interacting with a student. Crossing the boundaries of a student/teacher relationship is deemed an abuse of power and a betrayal of public trust.

**Acceptable and Unacceptable Behavior**

Some activities may seem innocent from a staff member’s perspective, but can be perceived as flirtation or sexual insinuation from a student or parent point of view. The objective of the following lists of acceptable and unacceptable behaviors is not to restrain innocent, positive relationships between staff and students, but to prevent relationships that could lead to, or may be perceived as, sexual misconduct.

Staff must understand their own responsibility for ensuring that they do not cross the boundaries as written in this policy. Disagreeing with the wording or intent of the established boundaries will be considered irrelevant for disciplinary purposes. Thus, it is crucial that all employees learn this policy thoroughly and apply the lists of acceptable and unacceptable behaviors to their daily activities. Although sincere, competent interaction with students certainly fosters learning, student/staff interaction has boundaries regarding the activities, locations and intentions.

**Duty to Report**

When any employee becomes aware of another staff member having crossed the boundaries specified in this policy, he or she must speak to the concerned co-worker if the violation appears minor, or report the matter to school administrators. If the observed behavior appears significant, it is the duty of every staff member to immediately report it to an administrator. All reports shall be confidential. It is the duty of the administrator to investigate and thoroughly report the situation. Employees must also report to the administration any awareness or concern of student behavior that cross boundaries or where a student appears to be at risk for sexual abuse.

**Unacceptable Behaviors (Violations of this Policy)**

1. Giving gifts to an individual student that are of a personal and intimate nature
2. Kissing of any kind
3. Any type of unnecessary physical contact with a student in a private situation
4. Intentionally being alone with a student away from the school
5. Making, or participating in sexually inappropriate comments
6. Sexual jokes
7. Seeking emotional involvement with a student for your benefit
8. Listening to or telling stories that are sexually oriented
9. Discussing inappropriate personal troubles or intimate issues with a student in an attempt to gain their support and understanding
10. Becoming involved with a student so that a reasonable person may suspect inappropriate behavior.

**Acceptable with Caution (These behaviors should only be exercised when a reasonable and prudent person, acting as an educator, is prevented from using a better practice or behavior. Staff members should inform their supervisor of the circumstance and occurrence)**

1. Giving students a ride to/from school or school activities without parent permission
2. Being alone in a room with a student at school with the door closed
3. Allowing students in your home without signed parent permission
4. Remarks about the physical attributes or development of anyone
5. Excessive attention toward a particular student
6. Sending emails, text messages or letters to students if the content is not about school activities

**Acceptable and Recommended Behaviors**

1. Getting parents' written consent for any after-school activity
2. Obtaining formal approval to take students off school property for activities such as field trips or competitions.
3. E-mails, text, phone and instant messages to students have to be very professional and pertaining to school activities or classes (Communication should be limited to school technology)
4. Keeping the door open when alone with a student
5. Keeping reasonable space between you and your students
6. Stopping and correcting students if they cross your own personal boundaries
7. Keeping parents informed when a significant issue develops about a student
8. Keeping after-class discussions with a student professional and brief
9. Asking for advice from fellow staff or administrators if you find yourself in a difficult situation related to boundaries
10. Involving your supervisor if conflict arises with the student
11. Informing your school leader about situations that have the potential to become more severe
12. Making detailed notes about an incident that could evolve into a more serious situation later
13. Recognizing the responsibility to stop unacceptable behavior of students or coworkers
14. Asking another staff member to be present if you will be alone with any type of special needs student
15. Asking another staff member to be present when you must be alone with a student after regular school hours
16. Giving students praise and recognition without touching them
17. Pats on the back, high fives and handshakes are acceptable
18. Keeping your professional conduct a high priority
19. Asking yourself if your actions are worth your job and career

## **Student Transportation Policy from Staff**

During school or school-sponsored functions, students may be transported only in school-approved vehicles operated by authorized personnel unless specific approval by the Office has been obtained.

Employees are specifically forbidden to transport students for school purposes without prior authorization by the Office.

The Office may develop regulations to govern the use of private vehicles for transporting students.

The use of a private vehicle for transporting students requires written permission from the school leader:

* This permission may be in the form of a standing permit for employees who use their own vehicles regularly for school purposes.  The permit will state the particular purpose, and whether it includes transportation of students (See Employee Vehicle Use Authorization Form).
* Each employee authorized to use a private vehicle for school business purposes will be required to present proof of insurance.

### Employee Vehicle Use Authorization Form

Employee Name\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee School\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Supervisor\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Vehicle Use\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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Will this include the transportation of students? yes\_\_\_\_\_\_ no\_\_\_\_\_\_

Explain: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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VEHICLE INFORMATION:

Make\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Year\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Model\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ License Plate #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Condition of Vehicle\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Owner & Address\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Is the vehicle presently insured? yes\_\_\_\_\_\_ no\_\_\_\_\_\_\_

If yes, please fill out the following:

Policy Number \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Insurance Company \_\_\_\_\_\_\_\_\_\_\_\_\_\_

Name of Agent \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Liability Coverage \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I understand that while driving my vehicle for school purposes, I am covered by the School Department insurance policy.

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Employee Signature

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Supervisor Signature School leader Signature

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