

Vision: The Mountain View-Birch Tree School District is two communities working as one to develop caring and responsible citizens.



Mission: Our mission is to empower and inspire all students to be successful before and after graduation. We strive to improve the quality of life through rigor, relevance, and relationships.

Mountain View-Birch Tree R-III School District

To: Board of Education Members
From: Mrs. Lanna Tharp, Superintendent
Re: Board Meeting Materials
Date: April 8, 2025
Board Meeting Date: April 10, 2025

Enclosed please find the following Board of Education packet information:

1. School Board Meeting Agenda
2. Explanation of School Board Meeting Agenda Items
3. Minutes of Previous Meeting
4. Copy of Monthly Bills
5. Monthly Financial Report
6. MSBA Policy Updates
7. Career Ladder Manual
8. Bus Negotiations Agreement
9. Administrative Reports

502 N. Elm, Mountain View, MO 65548 Phone: 417-934-5408

website: <https://home.liberty.mvbt.k12.mo.us/>

Superintendent: Mrs. Lanna Tharp email: ltarp@liberty.mvbt.k12.mo.us

Assistant Superintendent: Mr. Ryan Chowning email: rchowning@liberty.mvbt.k12.mo.us

Marsha Webb: Secretary to the Superintendent

Rhonda Henry: Bookkeeper

Tressa Henry: Accountant

MOUNTAIN VIEW-BIRCH TREE R-III SCHOOL DISTRICT
Reorganizational Meeting
April 10, 2025
6:00 P.M.
Liberty Middle School Library

Reorganizational/Special Meeting

I. Call Meeting To Order

A. Approve school board election results as certified by county Clerks

The General Municipal Election took place on April 8, 2025. There were two vacancies and two candidates signed up for the election. Initially, three candidates signed up, but one withdrew after the deadline, resulting in the requirement to hold an election. According to School Board Policy (BCA: Board Organizational meeting), the following must take place:

According to state law, the annual organizational meeting of the Board of Education shall be held within 14 days after the annual Board election. The newly elected members shall qualify by taking the oath of office as prescribed in Article VII, Section 11 of the Constitution of Missouri. The Board secretary shall administer the oath to the new members.

The Board shall organize by the election of a president and vice president, and the Board shall, on or before July 15 of each year, elect a secretary and a treasurer who shall assume their respective duties on July 15. The secretary and treasurer may or may not be members of the Board. The superintendent, who will serve as temporary chairperson, shall conduct the election of the president and vice president.

No Election Held

No election will be held if, after the last date of candidate filing, the number of candidates who have filed is equal to the number of positions to be filled by the election. However, if the number of candidates filing exceeds the number of positions, the election will be held even if a sufficient number of candidates withdraw so that the remaining candidates are equal to the number of positions to be filled.

The election is Tuesday, April 8. The unofficial results will be shared at the board meeting, since the election falls after the board packet is being released.

School Board Election: April 2025

Candidate	Howell County	Shannon County	Texas County	Total
Josh Roberts				
Mikael Orchard				

We should have certified results from all counties on Thursday, April 10, so hopefully, I'll be able to share those.

We need to certify the winners of the election.

Recommendation: Certify winners of the election as the individuals who will fill the two vacant positions on the school board.

II. Swear-in new school board members by Board Secretary

A. Oath of office—Article VII, Section 11, Missouri Constitution

Rhonda Henry will swear in the new board members.

III. Adjournment “sine die”

Adjournment “sine die” (Latin: without day) occurs when an elected body adjourns as its officers terms are ending and it anticipates the possibility of not meeting again as body as it currently stands.

IV. Reorganization of the Board of Education

According to board policy, the superintendent *“will serve as temporary chairperson, shall conduct the election of the president and vice president.”*

Nomination of Officers with superintendent acting as chairperson

- a. President of the Board of Education
- b. Vice-President of the Board of Education

Nomination of Officers with President of the Board of Education acting as chairperson

- a. Secretary to the Board of Education
- b. Treasurer of the Board of Education
- c. MSBA Delegate

V. Adjourn Reorganizational Meeting

MOUNTAIN VIEW-BIRCH TREE R-III SCHOOL DISTRICT
REGULAR SCHOOL BOARD MEETING
Thursday, April 10, 2025
Following School Board Reorganizational Meeting
Liberty Middle School Library

- VI. Determination of Quorum/Call Meeting to Order**
- VII. Pledge of Allegiance:** Mrs. Heiney
- VIII. Public Comment:** The Board will listen to the statement of any person speaking his/her opinion on any given agenda item.
- IX. Approval of Consent Agenda Items**
 - A. Minutes of Previous Meeting: Approval of last month's board meeting minutes
 - B. Approval of Payment of Monthly Bills.
 - C. Monthly Administrative/Principal Reports
- X. Adoption of Agenda**
- XI. Student Time**
 - A. Middle School Student Time
- XII. Committee Reports**
 - A. MSBA Delegate Report - - MSBA Board Delegate
- XIII. Program Review/Report**
 - A. Alternative Program Review
 - B. A+ Program Review
- XIV. Other Business**
 - A. None
- XV. Old Business**
 - A. None
- XVI. New Business**
 - A. Items extracted from consent agenda
 - B. Exceptions to monthly bills: Payment related to individuals related to Board members
 - C. Monthly Financial Report
 - D. Career Ladder Plan Approval
 - E. Certified Salary Schedule Approval
 - F. Policy Updates
 - G. Bus Negotiation Agreement
- XVII. Other Business**
 - A. None
- XVIII. Administrators' Reports**
 - A. Principals report on each of their buildings
- XIX. Move To Closed Session, Closed Vote, Closed Record**

The Board hereby gives notice to meeting in Closed Session to consider the following items pursuant to RSMo 610.021 (3) (13) (14)
- XX. Return to regular session**
- XXI. Adjourn**

MOUNTAIN VIEW-BIRCH TREE R-III BOARD OF EDUCATION MEETING
Explanation of Agenda Items
REGULAR SESSION
Tuesday, April 10, 2025
6:00 p.m.
Liberty Middle School Library

The information found on the following pages is provided for the Board Members to have advanced preparation to assist in making decisions and voting on issues relating to the publicly posted School Board Agenda. Information regarding state law and board policy have been included, as applicable, as well as an explanation of agenda items and the superintendent's recommendation for the agenda items.

I. Determination of Quorum/Call Meeting To Order

II. Pledge of Allegiance

- a. Mrs. Heiney will lead the pledge

III. Public Comment

According to Board policy BDDH: "A specifically designated time will be set aside for public comments at regular meetings of the Board of Education. The following rules will be applied to the public comment portion of the meeting:

- The Board will establish a time limit for the public comment period.*
- No individual will be permitted to speak more than once during this period.*
- The individual must reside in the district or be a landowner of the district.*
- The Board will establish a uniform time limit for each speaker.*
- Only items from the posted agenda may be discussed."*

IV. Approval of Consent Agenda Items

"The consent agenda allows members to vote on a group of items (en bloc) without discussion. This is a good way to dispose of business that is noncontroversial. "The presentation of the consent agenda is established by a special rule of order and should be taken up before committee reports.....If the consent agenda includes the approval of the minutes, then it should be taken up before any business is transacted."

Consent Agenda Items include:

- Minutes of previous meeting
- Monthly bills- - Identify and remove bills that must be approved individually
- Monthly Administrative/Principal Reports'

V. Adoption of Agenda

"The agenda shouldn't tie the hands of the assembly, prevent members from bringing up business, or enable a small group to railroad through their pet projects." "Agendas should have flexibility to provide for unseen things that may come up in a meeting."

VI. Student Time

- a. Middle School Student Time

VII. Committee Reports

"If a committee report includes a recommendation of action that it wants the organization to take, its report should include a motion at the end of the report by the committee chairperson." "A motion from a committee of more than one does not need a second....."

- a. MSBA delegate report regarding meetings or issues related to MSBA.

VIII. Program Review/Reports

- a. Mr. Daniels and Mrs. Heiney will report on what happens in the alternative classrooms.
- b. Mr. Daniels will report on the A+ program.

IX. Old Business

Discuss items tabled from previous school board meetings or issues ongoing from meeting to meeting.

- I. None

X. New Business

a. Items extracted from consent agenda

Exceptions to monthly bills and any other item that was extracted from the consent agenda

b. Exceptions to monthly bills

This is where bill payment is approved for individuals related to board members. Additionally, any bill paid to an entity where a board member or a board member's relative is at least a part-owner should be paid here.

c. Monthly Financial Report

The board packet also includes a new financial report statement showing fund balances at the end of last month which reflect our current balances. It is summarized as follows:

Month ending March 2025

Balances:	Incidental Fund (Fund 1): \$8,497,905.00
	Teacher's Fund (Fund 2): \$693,281.45
	Debt Service Fund (Fund 3): \$0
	Capital Projects Fund (Fund 4): \$2,910,701.04

Total (All Funds): \$12,101,701.04

Previous Year's Total (All Funds): \$10,717,412.62

d. Career Ladder Plan Approval

I have updated the Career Ladder Plan for the 2025-2026 school year. I will have a copy to review with the board members at the board meeting. We will need to approve the Career Ladder Plan as presented.

At this time, the state is planning to fund Career Ladder for the 2025-2026 school year.

Recommendation: I recommend the board approved the Career Ladder Plan as presented.

e. Approve certified salary schedule for the 2025-2026 school year

Missouri's Senate Bill 727 (SB 727), signed into law by Governor Mike Parson on May 8, 2024, enacts several measures to enhance teacher compensation and support education:

- **Minimum Teacher Salary Increase:** Beginning in the 2025-2026 school year, the minimum teacher salary will rise from \$25,000 to \$40,000.
- **Experienced Teacher Salary Enhancement:** For teachers with a master's degree and at least 10 years of experience, the minimum salary will increase from \$33,000 to \$46,000 in the 2025-2026 school year, with further \$1,000 annual increments until reaching \$48,000 by the 2027-2028 school year.
- **Annual Cost-of-Living Adjustments:** Starting in the 2028-2029 school year, all Missouri teachers' salaries will be adjusted annually based on the January Consumer Price Index report, capped at a 3% increase per year.
- **Teacher Baseline Salary Grant Program:** The act establishes a grant fund to assist school districts in meeting the new salary requirements. There is no guarantee that this grant will be available every year.

To simplify the salary structure and ensure competitive pay, the proposed salary schedule has been compressed by removing several columns, leaving only three degree categories: **Bachelor's, Master's, and Specialist**. No one will receive less next year than they are receiving this year. This new salary schedule will cost the district approximately \$115,000.00 more than the current certified salary schedule. Without compressing the salary schedule the new salary schedule will cost the district approximately \$197,000.00. The compressed salary schedule will be the most financially sustainable option for the district's budget, costing the district approximately \$115,000 more than the current schedule.

The proposed salary schedule will be presented to you at the board meeting.

	Additional cost to the district, with state grant (recommended)	Additional cost to the district if the grant is not funded by the state
Compressed Schedule (less columns), with increased minimum salary requirements	\$115,000.00	\$333,463.00
Current Schedule with increased minimum salary requirements	\$197,00.00	\$446,039.00

Recommendation: I recommend the board approve the new compressed salary schedule for the 2025-2026 school year as presented.

f. MSBA Policy Updates

This update is based primarily on recent rule changes issued by the U.S. Department of Agriculture (USDA) and the U.S. Office of Management and Budget (OMB) to improve operations, transparency, and compliance in federal programs.

The 2025A Update includes changes based on guidance from the Department of Elementary and Secondary Education on the resolution of disputes involving homeless students.

As always, the explanations on the first page of each update document include information and instructions that will assist the board and administration in understanding why they are being updated and how to modify them to best suit the district. The information on the first page of each update is provided below. Please read these policies and administrative procedures and the accompanying explanations carefully.

ADF-AP1: District Wellness Program

MSBA has updated this procedure to comply with the "Buy American" provision established under the National School Lunch Act.

In 2024, the U.S. Department of Agriculture (USDA) issued Child Nutrition Programs: Meal Patterns Consistent with the 2020-2025 Dietary Guidelines for Americans, a Final Rule with amendments and additional requirements for regulated school food programs. Many of the updates focus on nutritional standards for various kinds of foods and meal patterns.

The revised regulation implements the additional requirements and codifies exemptions for the "Buy American" provision of the National School Lunch Act. According to the USDA, "This final rule requires school food authorities to include the Buy American requirements in documented procurement procedures." This is a substantial "push" from the USDA on this program requirement, and we bring it to your attention so districts will be aware of its heightened profile for compliance and audit purposes.

DFA: Revenues From Investments/Use of Surplus Funds

The Missouri State Treasurer's Model Investment Policy (MSTMIP) is a "safe harbor" under § 30.950.3, RSMo. which says, "The state treasurer shall prepare a model form of an investment policy reflecting the principles set forth herein which shall be made available to political subdivisions in the state. Any political subdivision which formally adopts such a model investment policy shall be deemed to be in compliance with the requirements of this section." The MSTMIP is at <https://treasurer.mo.gov/link/ModelInvestmentPolicy.pdf>.

Boards have discretion on how to meet the legal requirements of a sound investment policy, the first of which is, "commitment to the principles of safety, liquidity and yield, in that order ..." § 30.950.2(1), RSMo. However, the MSTMIP is a one-size-fits-all approach with a limited range of options that may not suit all the needs of some districts.

Over time, both the MSTMIP and the Government Finance Officers Association (GFOA) Sample Investment Policy have changed (see <https://www.gfoa.org/materials/investment-policy>). MSBA believes that it is prudent for boards to review their investment policy and consider what is available.

The text of any customized investment policy should meet the unique needs and circumstances of the district it covers. The MSBA Policy Department cannot give districts specific securities investment advice. Advice on how to customize your investment policy beyond the "safe harbor" model should come from a registered investment advisor. Therefore, this update to DFA permits boards to customize their district's investment policy using advice from a professional to arrive at a sound investment policy tailored to their needs.

MSBA previously offered two versions of this policy, but the revisions in this update mean only one version of this policy is now necessary. Districts should adopt this version, simply coded DFA, rather than revising their former DFA-1 or DFA-2 to ensure proper functionality within the Simbli policy module. Districts that had previously adopted DFA-1 or DFA-2 should move their adoption date from that policy to the new DFA.

DFA-2: Revenues From Investments/Use of Surplus Funds

Districts should replace DFA-2 with the new draft of DFA included in this update. See the explanation on DFA for more information on these changes.

DJF-1-AP1: Purchasing

MSBA has updated this procedure to keep pace with changes to federal programs finance, operations, and compliance.

The U.S. Office of Management and Budget (OMB) updated its federal program rules in Title II of the Code of Federal Regulations on April 22, 2024, with an effective date of October 1, 2024 (unless a federal agency elects to use an earlier date not prior to July 1, 2024). The OMB's massive rewrite of the rules (89 Fed. Reg. 30046) is to improve federal financial assistance management, transparency, and oversight through more readily accessible and comprehensible guidance.

The Department of Elementary and Secondary Education (DESE) "Fiscal Guidance for Federal Grant Programs" (posted at <https://dese.mo.gov/media/pdf/general-federal-guidance> and last updated in April 2023) requires districts that receive federal funds to comply with federal policies established by legislative or executive authority. Under the guidance, "Subgrantees/recipients must have policies and procedures to implement and perform these requirements. They are to be reviewed as part of an audit of each state and local government or other entity which receives federal financial assistance."

Separately, the U.S. Court of Appeals for the Eighth Circuit validated an Arkansas statute against doing business with entities that boycott Israel. Missouri has a similar statute that is also presumably validated by the Court of Appeals' decision in *Arkansas Times LP v. Waldrup*, 37 F.4th 1386 (8th Cir. 2022). Districts must get certification from covered contractors that they do not boycott goods or services from the State of Israel, except for contracts of less than \$100,000 or with contractors who have fewer than ten employees.

The OMB 2024 changes took effect on October 1, 2024. A DESE guidance document incorporating the 2024 OMB revisions has not been published. However, MSBA consulted DESE before drafting this update in an effort to avoid any future program review issues.

DJFA: Federal Programs and Projects

MSBA has updated this policy to keep pace with changes to federal programs finance, operations, and compliance.

The U.S. Office of Management and Budget (OMB) updated its federal program rules in Title II of the Code of Federal Regulations on April 22, 2024, with an effective date of October 1, 2024 (unless a federal agency elects to use an earlier date not prior to July 1, 2024). The OMB's massive rewrite of the rules (89 Fed. Reg. 30046) is to improve federal financial assistance management, transparency, and oversight through more readily accessible and comprehensible guidance.

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The OMB 2024 changes took effect on October 1, 2024. A DESE guidance document incorporating the 2024 OMB revisions has not been published. However, MSBA consulted DESE before drafting this update in an effort to avoid any future program review issues.

DJFA-API: Federal Programs and Projects (Managing Federal Funds – Allowable Expenses)

MSBA has updated this procedure to keep pace with changes to federal programs finance, operations, and compliance.

The U.S. Office of Management and Budget (OMB) updated its federal program rules in Title II of the Code of Federal Regulations on April 22, 2024, with an effective date of October 1, 2024 (unless a federal agency elects to use an earlier date not prior to July 1, 2024). The OMB's massive rewrite of the rules (89 Fed. Reg. 30046) is to improve federal financial assistance management, transparency, and oversight through more readily accessible and comprehensible guidance.

The Department of Elementary and Secondary Education (DESE) "Fiscal Guidance for Federal Grant Programs" (posted at <https://dese.mo.gov/media/pdf/general-federal-guidance> and last updated in April 2023) requires districts that receive federal funds to comply with federal policies established by legislative or executive authority. Under the guidance, "Subgrantees/recipients must have policies and procedures to implement and perform these requirements. They are to be reviewed as part of an audit of each state and local government or other entity which receives federal financial assistance."

The OMB 2024 changes took effect on October 1, 2024. A DESE guidance document incorporating the 2024 OMB revisions has not been published. However, MSBA consulted DESE before drafting this update in an effort to avoid any future program review issues.

DJFA-AP2: Federal Programs and Projects (Managing Federal Funds – Cash Management)

MSBA has updated this procedure to keep pace with changes to federal programs finance, operations, and compliance.

The U.S. Office of Management and Budget (OMB) updated its federal program rules in Title II of the Code of Federal Regulations on April 22, 2024, with an effective date of October 1, 2024 (unless a federal agency elects to use an earlier date not prior to July 1, 2024). The OMB's massive rewrite of the rules (89 Fed. Reg. 30046) is to improve federal financial assistance management, transparency, and oversight through more readily accessible and comprehensible guidance.

The Department of Elementary and Secondary Education (DESE) "Fiscal Guidance for Federal Grant Programs" (posted at <https://dese.mo.gov/media/pdf/general-federal-guidance> and last updated in April 2023) requires districts that receive federal funds to comply with federal policies established by legislative or executive authority. Under the guidance, "Subgrantees/recipients must have policies and procedures to implement and perform these requirements. They are to be reviewed as part of an audit of each state and local government or other entity which receives federal financial assistance."

The OMB 2024 changes took effect on October 1, 2024. A DESE guidance document incorporating the 2024 OMB revisions has not been published. However, MSBA consulted DESE before drafting this update in an effort to avoid any future program review issues.

GBCBB: Protected Staff Communications

MSBA has updated this policy to reflect changes to the U.S. Code of Federal Regulations. The U. S. Office of Management and Budget (OMB) emphasized protections for federal programs whistleblowers by adding them to the 2024 OMB rewrite of the Code of Federal Regulations, Title II, Part 200, Subpart C, Pre-Federal Award Requirements and Contents of Federal Awards. MSBA now recommends districts add this new section on protected communications.

IGBCA: Programs for Homeless Students

The Department of Elementary and Secondary Education (DESE) has issued "Homeless Dispute Resolution Regarding the Education of Homeless Children and Youth Dispute Resolution (722(g)(1)(C) of the McKinney-Vento Homeless Assistance Act)" as the process for resolving disputes concerning eligibility, school selection, or school enrollment for homeless students or youth. The document is posted at dese.mo.gov/media/pdf/homeless-dispute-resolution-2024.

MSBA has updated this policy by shortening the section on disputes that now refers explicitly to the DESE document for the sake of compliance reviews and to guide the district's homeless liaison.

Recommendation: Approve the changes, additions, and deletions made by MSBA to the board policies above.

g. Revised Bus Negotiation Agreement

The negotiations with the bus drivers and MNEA were completed a couple of weeks ago. A final agreement was reached. The copy of the bus negotiation agreement in the board packet. I will review any changes to the agreement from last year with you at the board meeting.

Recommendation: Approve the bus negotiation agreement as presented.

XI. Other Business

- a. None

XII. Administrators' Reports

Administrators' Reports are enclosed in board packet. Additions or questions regarding Administrators' Reports should be discussed at this time

- a. Each administrator will report on things occurring at their school.

XIII. Move To Closed Session, Closed Vote, Closed Record

"I make a motion to go into closed session for the purpose of consideration of agenda items as authorized in RSMo Section 610.021 (3), (13), & (14)

RSMo 610.021.

(3) Hiring, firing, disciplining or promoting of particular employees by a public governmental body when personal information about the employee is discussed or recorded. However, any vote on a final decision, when taken by a public governmental body, to hire, fire, promote or discipline an employee of a public governmental body shall be made available with a record of how each member voted to the public within seventy-two hours of the close of the meeting where such action occurs; provided, however, that any employee so affected shall be entitled to prompt notice of such decision during the seventy-two-hour period before such decision is made available to the public. As used in this subdivision, the term "personal information" means information relating to the performance or merit of individual employees;

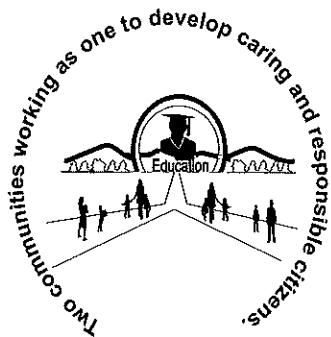
(13) Individually identifiable personnel records, performance ratings or records pertaining to employees or applicants for employment, except that this exemption shall not apply to the names, positions, salaries and lengths of service of officers and employees of public agencies once they are employed as such, and the names of private sources donating or contributing money to the salary of a chancellor or president at all public colleges and universities in the state of Missouri and the amount of money contributed by the source;

(14) Records which are protected from disclosure by law;

Recommendation - - Move to go into Closed Session, Closed Record, Closed Vote pursuant to RSMo 610.021 (3), (13), (14).

XIV. Return to regular session

XV. Adjourn



**Mountain View – Birch Tree R-III
School District**
502 N Elm Street
Mountain View, MO 65548
Phone (417) 934-5408 Fax (417) 934-5405

MINUTES OF BOARD MEETING

Meeting Place: Liberty High School Media Center
Type of Meeting: Regular Meeting
Time and Date: 6:00 p.m. March 20, 2025

Present	Members	Absent
<u>Eric Wells, Presiding</u> Board President		
<u>Mikael Orchard</u> Board Vice-President/Delegate		
<u>Shelly Mantel (via Google)</u>		
<u>Gaylon Noble</u>		
<u>Josh Roberts</u>		
<u>Mike Smith</u>		
<u>John Thompson</u>		
<u>Lanna Tharp</u> Superintendent of Schools		
<u>Rhonda Henry</u> Board Secretary/Treasurer		

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Mountain View – Birch Tree R-III School District

**502 N Elm Street
Mountain View, MO 65548
Phone (417) 934-5408 Fax (417) 934-5405**

Continuation of regular district board meeting held on March 20, 2025

I. Determination of Quorum

The Mountain View-Birch Tree R-III Board of Education met in regular session at 6:00 p.m. on March 20, 2025, in the Liberty High School Media Center. A quorum was present with Eric Wells, Presiding, Shelly Mantel (via Google), Gaylon Noble, Mikael Orchard, Josh Roberts, Mike Smith and John Thompson in attendance.

II. Mr. Daniels led the Pledge of Allegiance.

III. Public Comment

There were no requests for public comment.

IV. Consent Agenda

Mikael Orchard made a motion, seconded by Josh Roberts, to approve the following items on the consent agenda. The motion passed unanimously.

- A. Minutes of the February 13 regular meeting
- B. Payment of bills in the amount of \$898,509.37
- C. Monthly Administrative/Principal Reports

V. Adoption of Agenda

Josh Roberts made a motion, seconded by Mike Smith, to approve the Adoption of Agenda with the addition of Item E. Out of state overnight trips and Item F. Student Time both under New Business and student board representatives will give reports under Administrator's Reports. The motion passed unanimously.

VI. Committee Reports

- A. Shelly Mantel gave a MSBA Delegate report.

VII. Old Business

- A. None



Mountain View – Birch Tree R-III School District

**502 N Elm Street
Mountain View, MO 65548
Phone (417) 934-5408 Fax (417) 934-5405**

Continuation of regular district board meeting held on March 20, 2025

VIII. New Business

- A. There were no items extracted from the Consent Agenda.
- B. John Thompson made a motion, seconded by Gaylon Noble, to approve payment of \$163.50 for supply to The Angel Garden. The motion passed with six members in favor. Shelly Mantel abstained.

Josh Roberts made a motion, seconded by Mike Smith, to approve payment of \$104.42 for supply to Brown's Farm & Garden. The motion passed with six members in favor. Mikael Orchard abstained.

Mikael Orchard made a motion, seconded by John Thompson, to approve payment of \$628.00 for shirts to Lois Wood. The motion passed with six members in favor. Gaylon Noble abstained.
- C. Lanna Tharp presented the February 2025 financial report. The balance in all funds was \$11,439,375.74.
- D. Policy KK:Visitors to District Property and Events
 - A. Request to speak at board meeting was rescinded prior to meeting and there were no public comments or requests to speak during board meeting.
- E. Josh Roberts made a motion, seconded by Gaylon Noble, to approve the overnight, out of state trips for Beta Club and Ed Rising as presented. The motion passed unanimously.
- F. Student Time
 - A. Mrs. Field and 2 students from Educators Rising had a very interesting presentation. The girls co-wrote a book and placed 1st at the state competition.
- X. Other Business
 - A. None



**Mountain View – Birch Tree R-III
School District
502 N Elm Street
Mountain View, MO 65548
Phone (417) 934-5408 Fax (417) 934-5405**

Continuation of regular district board meeting held on March 20, 2025

XI. Monthly Program Report/Review

A. None

XII. Administrators' Report

A. The student board representatives, Mr. Daniels, Mrs. Jester, Mrs. Heiney, Mrs. Renshaw, Mrs. Medina and Mr. Chowning gave reports.

Adjournment to Closed Session

Josh Roberts made a motion at approximately 6:25 p.m., seconded by Gaylon Noble, to go into closed session for the purpose of consideration of agenda items as authorized in RSMo Section 610.021 (1) (3) (9)(13)(14). The motion passed as follows:

Shelly-yea
Gaylon-yea

Mikael-yea
Josh-yea

Mike-yea
John-yea

Eric-yea



Mountain View – Birch Tree R-III School District

502 N Elm Street
Mountain View, MO 65548
Phone (417) 934-5408 Fax (417) 934-5405

Continuation of regular district board meeting held on March 20, 2025

CLOSED SESSION

John Thompson made a motion, seconded by Mikael Orchard, to accept the resignations from Autumn Millard, BT Teacher, Roger Gastineau, MS Teacher and Amanda Pasay, SE MS Teacher, effective June 30, 2025. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-yea	Eric-yea
Gaylon-yea	Josh-yea	John-yea	

Josh Roberts made a motion, seconded by Gaylon Noble, to accept the resignations from Gina Freeman, District Process Coordinator, Richard Jester, HS Teacher and Christen Bryant, MS Para, effective June 30, 2025. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-yea	Eric-yea
Gaylon-yea	Josh-yea	John-yea	

Shelly Mantel made a motion, seconded by John Thompson, to employ Jacob Shockley, BT Teacher, Brandon Radford, HS Teacher and Richard Jester, JAG Teacher for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-yea	Eric-yea
Gaylon-yea	Josh-yea	John-yea	

Mikael Orchard made a motion, seconded by Josh Roberts, to employ Kelly Alcorn, SE MV Para and Christen Bryant, HS Nurse the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-yea	Eric-yea
Gaylon-yea	Josh-yea	John-yea	

Josh Roberts made a motion, seconded by Gaylon Noble, to employ Katie Shockley, Elementary Assistant Principal for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-yea	Eric-yea
Gaylon-yea	Josh-yea	John-yea	

Gaylon Noble made a motion, seconded by Mike Smith, to add Joshua Baker to the non-certified substitute list. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-yea	Eric-yea
Gaylon-yea	Josh-yea	John-yea	

Mikael Orchard made a motion, seconded by Josh Roberts, to reassign Holly Smith from MS Teacher to HS Teacher for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-abstain	Eric-yea
Gaylon-yea	Josh-yea	John-yea	



Mountain View – Birch Tree R-III School District

502 N Elm Street
Mountain View, MO 65548
Phone (417) 934-5408 Fax (417) 934-5405

Continuation of regular district board meeting held on March 20, 2025

CLOSED SESSION

Mike Smith made a motion, seconded by Gaylon Noble, to employ Lucas Frazier, SE MS/HS Para for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-abstain	Mike-yea	Eric-yea
Gaylon-yea	Josh-abstain	John-yea	

Mikael Orchard made a motion, seconded by Gaylon Noble, to employ the attached list of Tenured Teachers for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-yea	Eric-yea
Gaylon-yea	Josh-yea	John-yea	

John Thompson made a motion, seconded by Shelly Mantel, to employ Tenured Teacher, Jessica Abbey for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-abstain	Mike-yea	Eric-yea
Gaylon-yea	Josh-yea	John-yea	

Shelly Mantel made a motion, seconded by Mike Smith, to employ Tenured Teacher, Trina Frazier for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-abstain	Mike-yea	Eric-yea
Gaylon-yea	Josh-abstain	John-yea	

Mikael Orchard made a motion, seconded by Josh Roberts, to employ Tenured Teacher, Holly Smith for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-abstain	Eric-yea
Gaylon-yea	Josh-yea	John-yea	

Mikael Orchard made a motion, seconded by John Thompson, to employ the attached list of Probationary Teachers moving to Tenured as presented for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-yea	Eric-yea
Gaylon-yea	Josh-yea	John-yea	

Mike Smith made a motion, seconded by Josh Roberts, to employ Kristina Reese, Probationary Teacher moving to Tenured for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-abstain	Mike-yea	Eric-yea
Gaylon-yea	Josh-yea	John-yea	



Mountain View – Birch Tree R-III School District

502 N Elm Street
Mountain View, MO 65548
Phone (417) 934-5408 Fax (417) 934-5405

Continuation of regular district board meeting held on March 20, 2025

CLOSED SESSION

Mikael Orchard made a motion, seconded by Shelly Mantel, to employ the attached list of Probationary Teachers minus Gina Freeman for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-yea	Eric-yea
Gaylon-yea	Josh-yea	John-yea	

Gaylon Noble made a motion, seconded by John Thompson, to employ Probationary Teacher, Shauna Wells for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-yea	Eric-abstain
Gaylon-yea	Josh-yea	John-yea	

Mikael Orchard made a motion, seconded by Shelly Mantel, to employ Probationary Teacher, Janiece Wilbanks for the 2025-2026 school year. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-yea	Eric-yea
Gaylon-yea	Josh-abstain	John-abstain	

Josh Roberts made a motion, seconded by Mikael Orchard, to return to Open Session. The motion passed as follows:

Shelly-yea	Mikael-yea	Mike-yea	Eric-yea
Gaylon-yea	Josh-yea	John-yea	

Eric Wells, Board President

Rhonda Henry, Board Secretary



Mountain View – Birch Tree R-III School District

502 N Elm Street

Mountain View, MO 65548

Phone (417) 934-5408 Fax (417) 934-5405

Continuation of regular district board meeting held on March 20, 2025

Mikael Orchard made a motion at approximately 6:55 p.m., seconded by John Thompson, to adjourn the meeting. The motion passed as follows:

Shelly-yea
Gaylon-yea

Mikael-yea
Josh-yea

Mike-yea
John-yea

Eric-yea

Eric Wells, Board President

Rhonda Henry, Board Secretary

Mountain View-Birch Tree R-III
502 N Elm St
Mountain View, MO 65548

Dated : 4/4/2025 2024-2025
Time : 12:00 Page 1

Board Monthly Report

Selection Criteria : Check # = 161257 |

Check#	Vendor Name	Invoice Description	Check Amount	Line Amount
0000161257	CHOWNING RYAN	PD ADMINTRAVEL	114.40	114.40

Check #	Vendor Name	Invoice Description	Check Amount	Line Amount
0000161204	MASTER'S TRANSPORTATION	PT BUS PURCHASE	99,900.00	99,900.00
0000161205	MTN GROVE SCHOOL	HS ART ENTRY FEES	80.00	80.00
0000161206	SMFOA	HS FB ASSIGNING FEE	125.00	125.00
0000161207	PEARSON ASSESSMENTS	SE MV TESTS	4,196.06	113.00
0000161207	PEARSON ASSESSMENTS	SE MV TESTS		88.00
0000161207	PEARSON ASSESSMENTS	SE MV TESTS		12.06
0000161207	HARBOR FREIGHT	FFA GRANT SUPPLY		699.98
0000161207	HARBOR FREIGHT	FFA GRANT SUPPLY		699.98
0000161207	SIMMONS BANK CARD	NAT BETA TRAVEL		902.54
0000161207	BIG SHOTS	MV FD TRIP BIG SHOTS REFUND		(26.24)
0000161207	SIMMONS BANK CARD	PT TRAVEL		12.04
0000161207	SIMMONS BANK CARD	PT TRAVEL		32.00
0000161207	SIMMONS BANK CARD	PT BUS TITLE		8.92
0000161207	WALMART	PT SUPPLY		34.34
0000161207	SIMMONS BANK CARD	PT PART FREIGHT		14.95
0000161207	CHAMPS' FITNESS	HEALTH INCENTIVE		22.00
0000161207	CHAMPS' FITNESS	HEALTH INCENTIVE		22.00
0000161207	CHAMPS' FITNESS	HEALTH INCENTIVE		22.00
0000161207	CHAMPS' FITNESS	HEALTH INCENTIVE		22.00
0000161207	WALMART	OM SUPPLY		10.96
0000161207	TAN-TAR-A	PD MS/MV TRAVEL		0.00
0000161207	TAN-TAR-A	PD MS/MV TRAVEL		230.72
0000161207	TAN-TAR-A	PD MS/MV TRAVEL		99.49
0000161207	TAN-TAR-A	PD MS/MV TRAVEL		41.08
0000161207	SIMMONS BANK CARD	PD MV TRAVEL		325.00
0000161207	SIMMONS BANK CARD	PD MV TRAVEL		0.00
0000161207	SIMMONS BANK CARD	PD MV TRAVEL		76.10
0000161207	TAN-TAR-A	PD MS/MV TRAVEL		230.72
0000161207	TAN-TAR-A	PD MS/MV TRAVEL		0.00
0000161207	TAN-TAR-A	PD MS/MV TRAVEL		120.62
0000161207	SUBWAY SANDWICHES	HS GBB DIST HOSP ROOM		184.00
0000161207	MASA	PD ADMIN CONF		62.40
0000161207	SIMMONS BANK CARD	PD LUMEN CONF		45.40
0000161207	SIMMONS BANK CARD	PD LUMEN CONF		30.00
0000161207	SIMMONS BANK CARD	PD LUMEN CONF		30.00
0000161207	SIMMONS BANK CARD	PD LUMEN CONF		30.00
0000161208	ALLEN CHARLOTTE	S/L MS TRAVEL	121.60	121.60
0000161209	ARASMITH KEVIN	HS SB OFFICIAL	220.00	40.00
0000161209	ARASMITH KEVIN	HS SB OFFICIAL		180.00
0000161210	ATHLON INTERACTIVE ADV	HS TEAC APPRE PROGRAM	79.00	79.00
0000161211	BAYADA HOME HEALTH CA	PR NU SE HS SVC	520.00	520.00
0000161211	BAYADA HOME HEALTH CA	PR NU SE HS SVC		0.00
0000161212	BEESON DAVID	HS BSB OFFICIAL	315.00	255.00
0000161212	BEESON DAVID	HS BSB OFFICIAL		60.00
0000161213	BIG RIVER COMMUNICATION	OM TELEPHONE	390.00	390.00

Check #	Vendor Name	Invoice Description	Check Amount	Line Amount
0000161214	BSN SPORTS LLC	HS SOCCER	2,646.18	864.00
0000161214	BSN SPORTS LLC	HS SOCCER		51.84
0000161214	BSN SPORTS LLC	HS TRACK		196.00
0000161214	BSN SPORTS LLC	HS TRACK		15.68
0000161214	BSN SPORTS LLC	HS SOFTBALL		20.00
0000161214	BSN SPORTS LLC	HS SOFTBALL		150.00
0000161214	BSN SPORTS LLC	HS SOFTBALL		28.00
0000161214	BSN SPORTS LLC	HS SOFTBALL		28.86
0000161214	BSN SPORTS LLC	HS SOFTBALL		262.00
0000161214	BSN SPORTS LLC	HS SOFTBALL		21.00
0000161214	BSN SPORTS LLC	HS SOFTBALL		74.00
0000161214	BSN SPORTS LLC	HS SOFTBALL		262.00
0000161214	BSN SPORTS LLC	HS SOFTBALL		42.00
0000161214	BSN SPORTS LLC	HS SOFTBALL		178.00
0000161214	BSN SPORTS LLC	HS SOFTBALL		33.00
0000161214	BSN SPORTS LLC	HS SOFTBALL		15.00
0000161214	BSN SPORTS LLC	HS BASEBALL		210.00
0000161214	BSN SPORTS LLC	HS BASEBALL		158.00
0000161214	BSN SPORTS LLC	HS BASEBALL		36.80
0000161215	BYRNE ENTERPRISES INC	HS SOCCER	1,776.10	1,776.10
0000161216	CITY OF BIRCH TREE	BT WATER/SEWER/TRASH	611.82	295.00
0000161216	CITY OF BIRCH TREE	BT WATER/SEWER/TRASH		316.82
0000161217	CITY OF MOUNTAIN VIEW	PT/MV W/S/TRASH	7,275.04	883.40
0000161217	CITY OF MOUNTAIN VIEW	PT/MV W/S/TRASH		895.50
0000161217	CITY OF MOUNTAIN VIEW	PT/MV W/S/TRASH		44.46
0000161217	CITY OF MOUNTAIN VIEW	PT/MV W/S/TRASH		27.00
0000161217	CITY OF MOUNTAIN VIEW	PT/MV W/S/TRASH		40.00
0000161217	CITY OF MOUNTAIN VIEW	PT/MV W/S/TRASH		1,260.24
0000161217	CITY OF MOUNTAIN VIEW	PT/MV W/S/TRASH		827.57
0000161217	CITY OF MOUNTAIN VIEW	PT/MV W/S/TRASH		461.19
0000161217	CITY OF MOUNTAIN VIEW	PT/MV W/S/TRASH		2,749.02
0000161217	CITY OF MOUNTAIN VIEW	PT/MV W/S/TRASH		86.66
0000161218	CLAIM CARE INC	MEDICAID	10,426.14	315.15
0000161218	CLAIM CARE INC	MEDICAID		10,110.99
0000161219	CURTIS ANDREW	HS BSB TRAVEL	197.00	170.00
0000161219	CURTIS ANDREW	HS BSB TRAVEL		27.00
0000161220	DATA RECOGNITION CORP	FALL 2024 MAP ASSESS	14.40	14.40
0000161220	DATA RECOGNITION CORP	FALL 2024 MAP ASSESS		0.00
0000161220	DATA RECOGNITION CORP	FALL 2024 MAP ASSESS		0.00
0000161220	DATA RECOGNITION CORP	FALL 2024 MAP ASSESS		0.00
0000161221	DAYOS CHRIS	HS BSB OFFICIAL	310.00	55.00
0000161221	DAYOS CHRIS	HS BSB OFFICIAL		255.00
0000161222	EARLS BRAXTON	HS BSB OFFICIAL	273.00	255.00
0000161222	EARLS BRAXTON	HS BSB OFFICIAL		18.00
0000161223	ED COUNSEL LLC	BE LEGAL	1,302.00	1,302.00

Check #	Vendor Name	Invoice Description	Check Amount	Line Amount
0000161224	HEARTLAND BUSINESS SYS	TECH SERVICES	4,494.53	4,494.53
0000161225	HENRY JOE	HS BSB OFFICIAL	628.00	118.00
0000161225	HENRY JOE	HS BSB OFFICIAL		510.00
0000161226	HOAGLAND, JACKIE C	HS SB OFFICIAL	90.00	90.00
0000161227	HOWELL COUNTY NEWS	EA SUBSCRIPTION	35.00	35.00
0000161228	HUDDLESTON JIM	HS SB OFFICIAL	365.00	55.00
0000161228	HUDDLESTON JIM	HS SB OFFICIAL		310.00
0000161229	J.W. PEPPER & SON INC	HS BAND SUPPLY	245.73	39.99
0000161229	J.W. PEPPER & SON INC	HS CHOIR SUPPLY		38.00
0000161229	J.W. PEPPER & SON INC	HS CHOIR SUPPLY		16.25
0000161229	J.W. PEPPER & SON INC	HS CHOIR SUPPLY		67.00
0000161229	J.W. PEPPER & SON INC	HS CHOIR SUPPLY		22.50
0000161229	J.W. PEPPER & SON INC	HS CHOIR SUPPLY		52.00
0000161229	J.W. PEPPER & SON INC	HS CHOIR SUPPLY		9.99
0000161230	JOHANNSEN WILLIAM	HS BSB OFFICIAL	280.00	255.00
0000161230	JOHANNSEN WILLIAM	HS BSB OFFICIAL		25.00
0000161231	JOHNSON JEREMY	HS BSB OFFICIAL		25.00
0000161231	JOHNSON JEREMY	HS BSB OFFICIAL		255.00
0000161232	KREWSON BILLIE	HS BSB OFFICIAL	185.00	15.00
0000161232	KREWSON BILLIE	HS BSB OFFICIAL		170.00
0000161233	MAHIN LAUREN	MV TRAVEL	9.60	9.60
0000161234	MARTIN CANDRA N	BT TRAVEL	67.20	67.20
0000161235	METALWELD INC	PT/VO AG TANK RENT/SUPPL	115.75	63.85
0000161235	METALWELD INC	PT/VO AG TANK RENT/SUPPLY		35.85
0000161235	METALWELD INC	PT/VO AG TANK RENT/SUPPLY		16.05
0000161236	MOASSP	PD HS CONF	299.00	299.00
0000161237	MTN VIEW AUTO PARTS IN OM/PT PARTS		946.82	449.86
0000161237	MTN VIEW AUTO PARTS IN OM/PT PARTS			496.96
0000161238	MTN VIEW LUMBER CO	ATH SITE IMP/OM SUPPLY	1,859.25	1,436.89
0000161238	MTN VIEW LUMBER CO	ATH SITE IMP/OM SUPPLY		387.37
0000161238	MTN VIEW LUMBER CO	MV SCIENCE CLUB		34.99
0000161239	MV-BT BETA CLUB	SHIRT FUNDR	541.11	541.11
0000161240	MV-BT CLASS OF 25	HS BB CONCESSIONS	827.50	413.75
0000161240	MV-BT CLASS OF 25	HS BB CONCESSIONS		413.75
0000161241	MV-BT FBLA	SHIRT FUNDR	609.11	609.11
0000161242	MV-BT FCCLA	SHIRT FUNDR	791.11	791.11
0000161243	NORTH CAROLINA FARMS	GREENHOUSE SUPPLY	860.45	860.45
0000161244	PERMA BOUND BOOKS	LB HS BOOKS	1,461.78	96.98
0000161244	PERMA BOUND BOOKS	LB BT BOOKS		329.71
0000161244	PERMA BOUND BOOKS	LB BT BOOKS		0.00
0000161244	PERMA BOUND BOOKS	LB BT BOOKS		0.00
0000161244	PERMA BOUND BOOKS	LB BT BOOKS		0.00
0000161244	PERMA BOUND BOOKS	LB BT BOOKS		(30.00)
0000161244	PERMA BOUND BOOKS	LB BT BOOKS		457.69
0000161244	PERMA BOUND BOOKS	LB BT BOOKS		0.00

Check #	Vendor Name	Invoice Description	Check Amount	Line Amount
0000161244	PERMA BOUND BOOKS	LB BT BOOKS		0.00
0000161244	PERMA BOUND BOOKS	LB BT BOOKS		0.00
0000161244	PERMA BOUND BOOKS	LB BT BOOKS		(30.00)
0000161244	PERMA BOUND BOOKS	LB MV BOOKS		637.40
0000161245	PHOENIX HOME CARE & HI PR NU SE BT SVC		1,732.80	1,732.80
0000161245	PHOENIX HOME CARE & HI PR NU SE BT SVC			0.00
0000161246	PITNEY BOWES BANK INC FOM POSTAGE		900.00	900.00
0000161247	SANDERS NATHAN	HS BSB OFFICIAL	375.00	340.00
0000161247	SANDERS NATHAN	HS BSB OFFICIAL		35.00
0000161248	SHO-ME TECHNOLOGIES LI PT/EA TECH SVC		150.00	50.00
0000161248	SHO-ME TECHNOLOGIES LI PT/EA TECH SVC			100.00
0000161249	STANLEY JOSH	HS SB OFFICIAL	580.00	580.00
0000161250	SWAN DOUGLAS	HS BSB OFFICIAL	545.00	510.00
0000161250	SWAN DOUGLAS	HS BSB OFFICIAL	545.00	35.00
0000161251	TAG TRUCK CENTER OF PO H/C BUS REPAIR		692.47	692.47
0000161252	THARP LANNA	PD/ EA TRAVEL	693.08	121.20
0000161252	THARP LANNA	PD/ EA TRAVEL		571.88
0000161253	TNT WIFI	ATH COMPLEX WIFI	100.00	100.00
0000161254	TROTTER MERRI BETH	OT SE MAR SVC	7,497.60	2,396.80
0000161254	TROTTER MERRI BETH	OT SE MAR SVC		650.67
0000161254	TROTTER MERRI BETH	OT SE MAR SVC		592.00
0000161254	TROTTER MERRI BETH	OT SE MAR SVC		3,129.60
0000161254	TROTTER MERRI BETH	OT SE MAR SVC		728.53
0000161255	UNIVERSITY OF MO	PD HS CONF	60.00	60.00
0000161256	WADE JUSTIN	HS SB OFFICIAL	170.00	40.00
0000161256	WADE JUSTIN	HS SB OFFICIAL		130.00
			159,266.23	159,266.23

MOUNTAIN VIEW-BIRCH TREE R-III SCHOOL DISTRICT

MONTHLY FINANCIAL REPORT

MONTH ENDING MARCH 2025

FUND	OPENING BALANCE	RECEIPTS	TRANSFER RECEIPTS	EXPENDITURES	TRANSFER EXPENDITURES	CLOSING BALANCE
INCIDENTAL	\$ 8,085,695.55	\$ 645,062.97		\$ (232,852.63)		\$ 8,497,905.89
TEACHERS	\$ 62,114.00	\$ 725,776.91		\$ (94,609.46)		\$ 693,281.45
DEBT SERVICE						
CAPITAL PROJ	\$ 3,291,566.19	\$ 147,829.39		\$ (528,881.88)		\$ 2,910,513.70
TOTAL	\$ 11,439,375.74	\$ 1,518,669.27		\$ (856,343.97)		\$ 12,101,701.04

PREVIOUS YEAR	\$ 11,570,735.35	\$ 1,204,958.38	\$ (2,058,281.11)	\$ 10,717,412.62
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DEPOSITS

SIMMONS BANK OF MV	\$ 1,236,714.55
ALTON BANK	\$ 10,880,127.02
ALTON BANK SENIOR	\$ 108,394.94
TOTAL	\$ 12,225,236.51
PREVIOUS YEAR	\$ 11,137,443.20

RECONCILIATION

BANK BALANCE	\$ 12,225,236.51
OUTSTANDING CHECKS	\$ (214,535.47)
OUTSTANDING DEPOSITS	\$ -
ENDING BALANCE	\$ 12,010,701.04

Administrative Procedure ADF-AP(1): DISTRICT WELLNESS PROGRAM - (K-12 Districts)

Status: DRAFT

Original Adopted Date: 05/11/2006 | Last Revised Date: 07/12/2018

25A UPDATE EXPLANATION
(Version 1)

MSBA has updated this procedure to comply with the "Buy American" provision established under the National School Lunch Act.

In 2024, the U.S. Department of Agriculture (USDA) issued Child Nutrition Programs: Meal Patterns Consistent with the 2020-2025 Dietary Guidelines for Americans, a Final Rule with amendments and additional requirements for regulated school food programs. Many of the updates focus on nutritional standards for various kinds of foods and meal patterns.

The revised regulation implements the additional requirements and codifies exemptions for the "Buy American" provision of the National School Lunch Act. According to the USDA, "This final rule requires school food authorities to include the Buy American requirements in documented procurement procedures." This is a substantial "push" from the USDA on this program requirement, and we bring it to your attention so districts will be aware of its heightened profile for compliance and audit purposes.

The primary goals of the Mountain View-Birch Tree R-III School District's wellness program are to promote student health, reduce student overweight/obesity, facilitate student learning of lifelong healthy habits, and increase student achievement. The following procedures will guide the implementation of the district wellness program.

Nutrition Guidelines

The district is committed to ensuring that all foods and beverages sold, provided, or made available to students on school campuses during the school day support healthy eating and create an environment that reinforces the development of healthy eating habits. For that reason, and as required by law, the district has set the following nutrition standards for its meal programs, competitive foods and beverages sold outside the meal programs, and other foods and beverages provided or made available to students during the school day.

For the purposes of this procedure, the school day is the time period from the midnight before to 30 minutes after the official school day. These meal standards do not apply to food sold at other times, such as evening or weekend events.

Nutrition Standards for Meal Programs

The food sold to students as part of the district's meal programs will meet the requirements of the U.S. Department of Agriculture (USDA).

Nutrition Standards for Competitive Foods and Beverages

The foods and beverages sold and served during the school day outside the reimbursable school meal programs (competitive foods and beverages) will meet or exceed the USDA Smart Snacks in School (Smart Snacks) nutrition standards. These standards will apply in all locations any time foods and beverages are sold to students during the school day, which includes, but is not limited to, foods and beverages sold in vending machines, school stores, and snack or food carts; à la carte options in cafeterias; and food and beverages sold through district-sponsored fundraising, including fundraising by student-initiated groups, unless an exemption applies, as described below.

Fundraising Exemption to Nutrition Guidelines

Unless otherwise prohibited by board policies or limitations on marketing, the following are exemptions to the rule requiring that foods sold as fundraisers meet USDA standards:

1. Foods sold off campus, outside the school day, or to nonstudents do not have to meet the USDA standards.
2. Foods that do not meet USDA standards and are not intended for consumption at school may be delivered during the school day, and order forms for such food may be distributed during the school day, to the extent that these activities otherwise comply with district policies and procedures.

3. Each school building within the district may hold up to five one-day fundraisers per school year on district property during the school day that involve the sale of foods that do not meet USDA standards.

Nutrition Standards for Foods and Beverages Provided to Students during the School Day

All foods and beverages the district provides or makes available to students during the school day will meet or exceed the Smart Snacks nutrition standards. This includes, but is not limited to, foods and beverages provided or made available to students for celebrations, classroom parties, and birthdays, regardless of the source of the food. The district will provide parents/guardians and district employees with a list of foods and beverages that meet the Smart Snacks nutrition standards and a list of healthy party ideas, including nonfood celebration ideas.

Foods and beverages should not be used as a reward or withheld as punishment.

Water

Students will have access to safe and unflavored drinking water throughout the school day in every district facility used by students. Free, safe, and unflavored drinking water will be available to students during mealtimes in the places where meals are served.

Food Procurement

District food procurement will comply with USDA regulations, including implementation of the Buy American provision established under the National School Lunch Act.

The district may apply a geographic preference when procuring unprocessed, locally grown, or locally raised agricultural products and may use "locally grown," "locally raised," or "locally caught" as procurement specifications or selection criteria for unprocessed or minimally processed food items. When utilizing geographic preference to procure such products, the district has the discretion to determine the local area to which the geographic preference option will be applied, so long as there are an appropriate number of qualified vendors able to compete.

Nutrition Education

The district's nutrition education goal is to integrate sequential nutrition education with the comprehensive health education program and, to the extent possible, the core curriculum taught at every grade level in order to provide students with the necessary knowledge and skills to make healthy nutrition decisions. In order to achieve the nutrition education goal, the district will:

1. Provide students at all grade levels with adequate nutrition knowledge including, but not limited to:
 - The benefits of healthy eating.
 - Essential nutrients.
 - Nutritional deficiencies.
 - Principles of healthy weight management.
 - The use and misuse of dietary supplements.
 - Safe food preparation, handling, and storage.
2. Provide students with nutrition-related skills that minimally include the ability to:
 - Plan healthy meals.
 - Understand and use food labels.
 - Apply the principles of the USDA's Dietary Guidelines for Americans and MyPlate.
 - Critically evaluate nutrition information, misinformation, and commercial food advertising.

- Assess personal eating habits, nutrition goal-setting, and achievement.
3. Provide instructional activities that stress the appealing aspects of healthy eating and are hands-on, behavior based, culturally relevant, developmentally appropriate, and enjoyable. Examples of activities include, but are not limited to: food preparation, contests, promotions, taste testings, farm visits, and school gardens.
 4. Encourage district staff to cooperate with local agencies and community groups to provide students with opportunities for volunteer work related to nutrition, such as in food banks, soup kitchens, or after-school programs.
 5. Provide information to all school staff about the symptoms of nutrition-related conditions such as unhealthy weight, eating disorders, and other nutrition-related health problems. Staff members who identify students who may have nutrition-related conditions will notify school counselors or student health services staff. When appropriate, school counselors or student health services staff will provide information about these conditions, including available treatment options, to the students and his or her their parents/guardians.
 6. Coordinate the food service program with nutrition instruction. Food service staff should also work closely with those responsible for other components of the school health program to achieve common goals.

Nutrition Promotion

Nutrition promotion that uses evidence-based techniques to encourage healthy nutrition choices and participation in school meal programs positively influences lifelong eating behaviors. Students and staff will receive consistent nutrition messages throughout district facilities. Nutrition promotion also includes marketing and advertising nutritious foods and beverages to students and is most effective when implemented consistently by school staff, parents/guardians, and the community. The district will promote the importance of good nutrition in its schools and in the community through one or more of the following activities:

1. Offering healthy eating seminars for parents/guardians.
2. Providing nutrition information to parents/guardians via newsletters, handouts, presentations, or other appropriate means.
3. Posting nutrition tips on district websites.
4. Offering appropriate, participatory activities, such as cooking lessons or demonstrations, taste testings, farm visits, and school gardens.
5. Disseminating information about community programs that offer nutrition assistance to families.
6. Posting links on district websites to research and articles explaining the connections between good nutrition and academic performance.
7. Providing school meals that meet a variety of cultural preferences with a special emphasis on the populations served by the district.
8. Posting menus, including nutrient contents and ingredients, on district and school websites.

If practical, the district will provide information in a language understandable to the parents/guardians.

Marketing and Advertising

Marketing in district facilities will be consistent with the goals of the district's wellness program and comply with board policy. The district will strive to promote the wellness program and educate parents/guardians regarding the quality of district foods.

Food and beverage marketing will be limited to the promotion of foods and beverages that meet the Smart Snacks nutrition standards. Other examples of marketing and advertising the district will scrutinize include, but are not limited to, pricing strategies that promote healthy food choices; audiovisual programming; educational incentive programs; scoreboards; book covers; district transportation; and vending machine displays.

Physical Activity

Moderate Physical Activity – Low-impact to medium-impact physical exertion designed to increase an individual's heart rate to rise to at least 75 percent of his or her maximum heart rate. Examples of moderate physical activity include, but are not limited to, running, calisthenics, or aerobic exercise. Time spent in recess and physical education counts as moderate physical activity.

Recess – A structured play environment outside of regular classroom instructional activities that allows students to engage in safe and active free play.

The district's physical activity goal is to assist students in learning to value and enjoy physical activity as an ongoing part of a healthy lifestyle by ensuring that every student has the opportunity to develop the knowledge, skills and desire to perform a variety of physical activities, maintain physical fitness, and regularly participate in physical activity. In order to achieve the physical activity goal, the district will:

1. Develop a sequential program of appropriate physical education aligned with the Missouri Learning Standards for every student. The elementary program will provide for:
 - Forty minutes of recess per day. Recess may be incorporated into the lunch period, but will be scheduled before lunch and held outdoors when possible.
 - An average of 200 minutes of moderate physical activity each five-day school week or an average of 40 minutes per school day. The program will also provide for 200/40 minutes per week/day of physical education under the supervision of a certified physical education instructor.
 - The middle school program will provide for 275 minutes of moderate physical activity during each school week and 8,800 minutes of physical education per year.
 - The high school program will provide for one unit of physical education prior to graduation.

All activity will:

- Emphasize knowledge and skills for a lifetime of regular physical activity.
 - Meet the needs of all students, especially those who are not physically skilled or who have special needs.
 - Provide a variety of activity choices, feature cooperative as well as competitive activities, and account for gender and cultural differences in students' interests.
 - Prohibit exemptions from physical education courses on the basis of based on participation in an athletic team, community recreation program, ROTC, marching band, or other school or community activity.
 - Contribute to achieving the goals established in the district's wellness policy and be closely coordinated with the other components of the overall school health program.
2. Provide opportunities and encouragement for students to voluntarily participate in before- and after-school physical activity programs designed to supplement, not replace, the district's physical education offerings, such as intramural activities, interscholastic athletics, and clubs by:
 - Providing a diverse selection of competitive and noncompetitive, as well as structured and unstructured, activities to the extent that staffing and district/community facilities permit.
 - Offering intramural physical activity programs that feature a broad range of competitive and cooperative activities for all students.
 - Encouraging partnerships between schools and businesses. Promotion of such partnerships must be appropriate and in accordance with board policy and applicable procedures.
 3. Strive to provide joint school and community recreational activities by:
 - Actively engaging families as partners in their children's education and collaborating with community

agencies and organizations to provide ample opportunities for students to participate in physical activity beyond the school day.

- Working with recreation agencies and other community organizations to coordinate and enhance opportunities available to students for physical activity during their out-of-school time.
 - Negotiating mutually acceptable, fiscally responsible arrangements with community agencies and organizations to keep district-owned facilities open for use by students, staff, and community members during nonschool hours and vacations.
 - Working with local public works, public safety, police departments, and/or other appropriate state and federal authorities in efforts to make it safer and easier for students to walk and bike to school.
4. Prohibit the use of physical activity as a form of discipline or punishment and ensure that physical education and recess will not be withheld as punishment.
 5. Discourage periods of inactivity that exceed two or more hours. When activities such as mandatory schoolwide testing make it necessary for students to remain indoors for long periods of time, staff should give students periodic breaks during which they are encouraged to stand and be moderately active.
 6. Provide and encourage—verbally and through the provision of space, equipment, and activities—daily periods of moderate to vigorous physical activity for all participants in on-site after-school childcare and enrichment programs sponsored by the district.
 7. Provide opportunities and encouragement for staff to be physically active by:
 - Planning, establishing, and implementing activities to promote physical activity among staff and providing opportunities for staff to conveniently engage in regular physical activity.
 - Working with recreation agencies and other community organizations to coordinate and enhance opportunities available to staff for physical activity during their out-of-school time.

Other School-Based Activities

The district's goal for other school-based activities is to ensure an integrated whole-school approach to the district's wellness program. The district will achieve this goal by addressing the areas itemized below.

Community Involvement

Staff will collaborate with agencies and groups conducting nutrition education in the community to send consistent messages to students and their families. A list of foods and beverages that meet the Smart Snacks nutrition standards and ideas for healthy celebrations, rewards, and nonfood fundraising activities will be provided to community organizations that serve youth. Guest speakers invited to address students will receive appropriate orientation to the relevant policies of the district.

The wellness program shall make effective use of district and community resources and equitably serve the needs and interests of all students and staff, taking into consideration differences of gender, cultural norms, physical and cognitive abilities, and fitness level.

Family Involvement

The district will strive to engage families as partners in their children's education by supporting parental efforts to motivate and help their children with maintaining and improving their health, preventing disease, and avoiding health-related risk behaviors. Strategies the district may implement to achieve family involvement may include, but are not limited to:

1. Providing nutrient analyses of district menus.
2. Providing parents/guardians with a list of appropriate foods that meet the district's nutrition standards for snacks.

3. Providing parents/guardians with ideas for nonfood rewards and healthy celebrations, parties, and fundraising activities.
4. Encouraging parents/guardians to pack healthy lunches and snacks and to refrain from including beverages and foods that do not meet the district's nutrition standards.
5. Designing curricular nutrition education activities and promotions to involve parents/guardians and the community.
6. Supporting efforts of parents/guardians to provide their children with opportunities to be physically active outside of school.
7. Providing information about physical education and other school-based physical activity opportunities available to students before, during, and after the school day.
8. Sharing information about physical activity and physical education via the district's website, newsletter, other take-home materials, special events, or physical education homework.
9. Working with families to provide consistent sun safety information that includes an overview of the district's sun safety program, and an explanation of how parents/guardians can reinforce the program at home and how they can become involved with and support the district's program.
10. Encouraging parents/guardians to volunteer time in the classroom, cafeteria, or at special events that promote student health.
11. Providing opportunities for parent/guardian involvement with the district wellness committee.

If practical, the district will provide information in a language understandable to parents/guardians.

Indoor Air Quality

District employees will refrain from using candles, oils, sprays, plug-ins, and other sources of fragrance. Pesticides and cleaning products will be used only in accordance with district policies and procedures.

Mealtimes

Students are not permitted to leave school campus during the school day to purchase food or beverages. Mealtimes will comply with the following guidelines:

1. Mealtimes will provide students with at least 15 minutes to eat after sitting down for breakfast and 20 minutes after sitting down for lunch.
2. Activities such as tutoring or meetings will not be held during mealtimes unless students may eat during such activities.
3. At the elementary level, lunch periods will follow recess periods.
4. Free, safe, and unflavored drinking water will be available to students during meals in the meal service area.
5. Students will have access to hand-washing facilities before they eat meals or snacks.
6. The district will take reasonable steps to accommodate the toothbrushing regimens of students.
7. Students will be allowed to converse during meals.
8. The cafeteria will be clean, orderly, and inviting.
9. Adequate seating and supervision will be provided during mealtimes.

Outdoor Air Quality

The principal or designee of each school will be responsible for daily monitoring of Air Quality Index (AQI) information provided by local authorities.

1. When the AQI is "code orange" (unhealthy for sensitive groups of people), students with a history of reactions to ozone exposure will be permitted to reduce their outdoor exertion level or time spent outdoors, and the staff will arrange alternative indoor physical activities. Appropriately trained staff responsible for student supervision will monitor such students for symptoms of respiratory distress.
2. When the AQI is "code red" (unhealthy), students with a history of reactions to ozone exposure will remain indoors and participate in indoor physical activities. Appropriately trained staff responsible for student supervision will monitor such students for symptoms of respiratory distress. All other students will be allowed to engage in no more than one hour of heavy exertion (i.e., activities that involve high-intensity exercise such as basketball, soccer, and running) while outdoors.
3. When the AQI is "code purple" (very unhealthy) or "code maroon" (hazardous), all students will be kept indoors and participate in indoor physical activities. Appropriately trained staff responsible for student supervision will monitor all students for symptoms of respiratory distress.

Staff Development and Training

All staff will be provided with ongoing training and professional development related to all areas of student wellness. The pre-service and ongoing in-service training will include teaching strategies for behavior change and will focus on giving teachers the skills they need to use non-lecture, active learning methods. Staff responsible for nutrition education will be adequately prepared and regularly participate in professional development activities to effectively deliver the nutrition education program as planned. Staff responsible for implementing the physical education program will be properly certified and regularly participate in area-specific professional development activities.

Qualified nutrition professionals will administer the district meal programs and will receive ongoing, area-specific professional development. The district will provide continuing professional development for all district nutrition professionals. Staff development programs will include appropriate certification and/or training programs for child nutrition directors, school nutrition managers, and cafeteria workers according to their levels of responsibility.

Staff Wellness

The Mountain View-Birch Tree R-III School District highly values the health and well-being of every staff member and will plan and implement activities and policies that support personal efforts by staff to maintain a healthy lifestyle. The district will offer staff wellness programs that include education on nutrition, healthy eating behaviors, and maintaining a healthy weight for optimal health. The district will establish and maintain a staff wellness committee composed of at least one staff member; wellness committee member; registered dietitian, school nurse, or other health professional; employee benefits specialist; and other appropriate personnel. The staff wellness committee will serve as a subcommittee of the district wellness committee. The staff wellness committee will develop, promote, and oversee a multifaceted plan to promote staff health and wellness. The plan will be based on input solicited from district staff and will outline ways to encourage healthy eating, physical activity, sun safety, and other elements of a healthy lifestyle. The staff wellness committee will provide a copy of its plan to the wellness program committee.

Sun Safety

"Sun safety" describes a range of behaviors that include wearing appropriate clothing, applying sunscreen, and limiting sun exposure. The sun safety program will focus on outdoor behavior and will be developmentally appropriate, active, engaging, and taught in lessons that emphasize the benefits of sun safety. Sun safety education will be designed to assist students with:

1. Knowledge about the harmful effects of the sun and ways to protect skin.
2. Sun-safe skills, including the correct use of protective clothing, hats, sunglasses, sunscreen, and lip balm as well as seeking shade and limiting sun exposure when possible and practical during the hours of peak sun intensity.
3. Knowledge about how to assess personal sun safety habits, set goals for improvement, and achieve these goals.

Tobacco

Tobacco use prevention education will focus on all grades with particular emphasis on middle school and reinforcement in all later grades. Instructional activities will be participatory and developmentally appropriate. Tobacco use prevention education programs will be implemented in accordance with board policy, relevant administrative procedures, and law.

Oversight and Assessment

The wellness program coordinator are responsible for monitoring implementation and assessing the effectiveness of the district wellness program by:

1. Completing the required triennial assessment.
2. Prioritizing wellness goals and writing work plans for each goal.
3. Measuring implementation of the district wellness policy and procedure.
4. Ensuring that the district meets the goals of the wellness policy and procedure.
5. Reporting to the board on compliance and progress.
6. Comparing the district's policy to model policies.

Compliance Indicators

The program coordinator will use the Centers for Disease Control and Prevention (CDC) School Health Index as a measure of the overall effectiveness of the local wellness program. In addition, the wellness program coordinator will identify at least one other assessment tool, including those available through the USDA or CDC, that provides measures not covered by the School Health Index. Assessment tools may be locally created.

Policy Review

The wellness program coordinator will provide policy revision recommendations to the board as part of the periodic report. The recommendations will be based on analysis of the compliance indicators and comparison of the district's policy to model policies provided, recommended, or referenced by the USDA. The board will revise the wellness policy as it deems necessary. Administrative procedures will be revised accordingly.

Policy DFA: REVENUES FROM INVESTMENTS/USE OF SURPLUS FUNDS

Status: DRAFT

Original Adopted Date: Pending | Last Reviewed Date: 02/20/2020

25A UPDATE EXPLANATION

The Missouri State Treasurer's Model Investment Policy (MSTMIP) is a "safe harbor" under § 30.950.3, RSMo, which says, "The state treasurer shall prepare a model form of an investment policy reflecting the principles set forth herein which shall be made available to political subdivisions in the state. Any political subdivision which formally adopts such a model investment policy shall be deemed to be in compliance with the requirements of this section." The MSTMIP is at <https://treasurer.mo.gov/link/ModelInvestmentPolicy.pdf>.

Boards have discretion on how to meet the legal requirements of a sound investment policy, the first of which is, "commitment to the principles of safety, liquidity and yield, in that order ..." § 30.950.2(1), RSMo. However, the MSTMIP is a one-size-fits-all approach with a limited range of options that may not suit all the needs of some districts.

Over time, both the MSTMIP and the Government Finance Officers Association (GFOA) Sample Investment Policy have changed (see <https://www.gfoa.org/materials/investment-policy>). MSBA believes that it is prudent for boards to review their investment policy and consider what is available.

The text of any customized investment policy should meet the unique needs and circumstances of the district it covers. The MSBA Policy Department cannot give districts specific securities investment advice. Advice on how to customize your investment policy beyond the "safe harbor" model should come from a registered investment advisor. Therefore, this update to DFA permits boards to customize their district's investment policy using advice from a professional to arrive at a sound investment policy tailored to their needs.

MSBA previously offered two versions of this policy, but the revisions in this update mean only one version of this policy is now necessary. Districts should adopt this version, simply coded DFA, rather than revising their former DFA-1 or DFA-2 to ensure proper functionality within the Simbli policy module. Districts that had previously adopted DFA-1 or DFA-2 should move their adoption date from that policy to the new DFA.

The board authorizes the superintendent to invest surplus school district moneys that are determined as not being immediately needed for the operation of the school district. The superintendent is authorized to delegate this authority to another administrator with the knowledge and skills necessary to manage the district's investments. The superintendent or designee shall follow procedures established by the board in making investments and obtaining the best interest rates possible. Collateralized investments will comply with the requirements of the Financial Institutions Reform, Recovery, and Enforcement Act of 1989.

Unless and until the board formally adopts and directs the district to comply with a customized written investment policy upon professional advice from a registered investment advisor, the board adopts and directs the district to follow the Missouri State Treasurer's Model Investment Policy, as may be amended from time to time, which is incorporated herein by reference.

Policy DFA-2: REVENUES FROM INVESTMENTS/USE OF SURPLUS FUNDS

Status: DRAFT

Original Adopted Date: 12/16/1993 | Last Revised Date: 02/20/2020

**25A UPDATE EXPLANATION
(Version 2)**

Districts should replace DFA-2 with the new draft of DFA included in this update. See the explanation on DFA for more information on these changes.

(District Utilizes a Registered Investment Advisor to Manage Some or All of Its Investments)

The DistrictCommonName board of education authorizes and appoints the superintendent or designee as the finance officer of the school district to invest surplus school district moneys that are determined as not being needed within a reasonable period of time for the operation of the district. The finance officer shall follow procedures adopted by the board in making investments and obtaining the best interest rates reasonably attainable. Collateralized investments will comply with the requirements of the Financial Institutions Reform, Recovery and Enforcement Act (FIRREA) of 1989.

I. Scope

Except as otherwise provided, this policy applies to the investment of all operating funds of the district.

1. Pooling of Funds

Except for cash in certain restricted and special funds, the district will consolidate cash balances from all funds to maximize investment earnings. Investment income will be allocated to the various funds based on their respective participation and in accordance with generally accepted accounting principles.

2. External Management of Funds

Investment through external programs, facilities and professionals operating in a manner consistent with this policy will constitute compliance.

II. General Objectives

The primary objectives, in priority order, of investment activities shall be safety, liquidity and yield.

1. Safety

Safety of principal is the foremost objective of the investment program. Investments shall be undertaken in a manner that seeks to ensure the preservation of capital in the overall portfolio. The objective will be to mitigate credit risk and interest rate risk.

a. Credit Risk

The district will minimize credit risk, the risk of loss due to the failure of the security issuer or credit provider, by:

- Pre-qualifying the financial institutions, brokers/dealers, intermediaries and advisors with whom the district will do business;
- Diversifying the portfolio so that potential losses on individual securities will be minimized.

b. Interest Rate Risk

The district will minimize the risk that the market value of securities in the portfolio will fall due to changes in general interest rates by:

- Structuring the investment portfolio so that securities mature to meet cash requirements for

ongoing operations, thereby avoiding the need to sell securities on the open market prior to maturity;

- Investing operating funds primarily in shorter-term securities;

2. Liquidity

The investment portfolio shall remain sufficiently liquid to meet all operating requirements that may be reasonably anticipated. This is accomplished by structuring the portfolio so that securities mature concurrent with cash needs to meet anticipated demands (static liquidity). Furthermore, since all possible cash demands cannot be anticipated, the portfolio should consist largely of securities with active secondary or resale markets (dynamic liquidity). A portion of the portfolio also may be placed in bank certificates of deposits or repurchase agreements that offer same-day liquidity for short-term funds.

3. Yield

The investment portfolio shall be designed with the objective of attaining a market rate of return throughout budgetary and economic cycles, taking into account the investment risk constraints and liquidity needs. Return on investment is of secondary importance to the safety and liquidity objectives described above. The core of investment is limited to relatively low-risk securities in anticipation of earning a fair return relative to the risk being assumed. Securities shall not be sold prior to maturity except when:

- The early selling of security with declining credit minimizes loss of principal;
- Replacing a given security with another would improve the quality, yield or target duration of the portfolio;
- The liquidity needs of the portfolio require that the security be sold;

III. Standards of Care

1. Prudence

All participants in the investment process shall act responsibly as custodians of the public trust. The standard of prudence to be used by the finance officer shall be the "prudent investor" rule, which reads: "Investments shall be made with judgment and care, under circumstances then prevailing, which persons of prudence, discretion and intelligence exercise in the management of their own affairs, not for speculation, but for investment, considering the probable safety of their capital as well as the probable income to be derived."

2. Ethics and Conflicts of Interest

Officers and employees of the district involved in the investment process shall refrain from personal business activity that could conflict with the proper execution and management of the investment program or that could impair their ability to make impartial decisions. Officers, employees and the investment officer shall disclose any material interests in financial institutions with which they conduct business. They shall further disclose any personal financial/investment positions that could be related to the performance of the investment portfolio. Officers and employees of the district shall refrain from undertaking personal investment transactions with the same individual with whom business is conducted on behalf of the district.

3. Delegation of Authority

Authority to manage the investment program is granted to the finance officer and/or another duly authorized external professional organization (to be collectively known as the "investment officer"), including the Missouri Securities Investment Program. Responsibility for the operation of the investment program is hereby delegated to the investment officer, who shall act in accordance with the established written procedures and internal controls for the operation of the investment program consistent with this investment policy. The investment officer shall ensure that the investment program's operations are in accordance with the established written procedures and internal controls for the operation of the investment program consistent with this investment policy.

Procedures should include references to safekeeping, delivery vs. payment, investment accounting, repurchase agreements, wire transfer agreements and collateral/depository agreements. No person may engage in an investment transaction except as provided under the terms of this policy and the procedures established by the investment officer. The investment officer shall be responsible for all transactions undertaken and shall establish a system of controls to regulate the activities of authorized subordinate officials.

IV. Investment Transactions

1. Authorized Financial Dealers and Institutions

A list will be maintained of financial institutions authorized to provide investment transactions. In addition, a list also will be maintained of approved security brokers/dealers selected by creditworthiness as determined by the finance officer and approved by the board. These may include "primary" dealers or regional dealers that qualify under Securities and Exchange Commission (SEC) Rule 15(c)3-1 (uniform net capital rule).

All financial institutions and brokers/dealers who desire to become qualified for investment transactions must supply the following to the finance officer as appropriate:

- Audited financial statements;
- Proof of National Association of Securities Dealers (NASD) certification;
- Proof of applicable state registration;
- Completed broker/dealer questionnaire;
- Confirmation of having read, understood and agreed to comply with the district's investment policy.

The finance officer will conduct an annual review of the financial condition and registration of qualified financial institutions and brokers/dealers.

2. Internal Controls

The finance officer is responsible for establishing and maintaining an internal control structure that will be reviewed annually with the district's independent auditor. The internal control structure shall be designed to ensure that the assets of the district are protected from loss, theft or misuse and to provide reasonable assurance that these objectives are met. The concept of reasonable assurance recognizes that 1) the cost of control should not exceed the benefits likely to be derived and 2) the valuation of costs and benefits require estimates and judgments by management.

The internal controls shall address the following points:

- Prevention of collusion;
- Separation of transaction authority from accounting and recordkeeping;
- Custodial safekeeping;
- Avoidance of physical delivery securities;
- Clear delegation of authority to subordinate staff members;
- Written confirmation of transactions for investments and wire transfers;
- Development of a wire transfer agreement with the lead bank and third party custodian;

3. Delivery vs. Payment

All trades where applicable will be executed by delivery vs. payment to ensure that securities are deposited in eligible financial institutions prior to the release of funds. All securities shall be perfected in the name of or for the account of the district and shall be held by a third-party custodian as evidenced by appropriate safekeeping receipts.

V. Suitable and Authorized Investments

1. Investment Types

In accordance with and subject to restrictions imposed by current statutes, the following list represents the entire range of investments that the district will consider and that shall be authorized for the investments of funds by the district:

- a. **Securities issued by State of Missouri/Political Subdivisions** – The district may invest in obligations of the Missouri government and its political subdivisions for which the full faith and credit of the issuer is pledged for the payment of principal and interest.
- b. **United States Treasury Securities** – The district may invest in obligations of the United States government for which the full faith and credit of the United States is pledged for the payment of principal and interest.
- c. **United States Agency Securities** – The district may invest in obligations issued or guaranteed by any agency or any wholly owned corporation of the U.S. government as described in section V (2) of this policy.
- d. **Securities Issued by Instrumentalities/Government-Sponsored Enterprises of the United States** – The district may invest in obligations of instrumentalities or government-sponsored enterprises of the United States, including supranational organizations created by an act of Congress or treaty to which the United States is a party. Debt obligations of supranational organizations must have received the highest rating issued by one or more nationally recognized statistical rating organizations, and no more than five percent of the total market value of the portfolio may be invested in the obligations of any supranational organization.
- e. **Repurchase Agreements** – The district may invest in contractual agreements between the district and commercial banks or primary government securities dealers. The purchaser in a repurchase agreement (repo) enters into a contractual agreement to purchase U.S. Treasury or government agency securities while simultaneously agreeing to resell the securities at predetermined dates and prices. Such securities shall have a market value of 102 percent of the value of the repurchase agreement, and the term of such agreement must not exceed 90 days.
- f. **Collateralized Public Deposits (Certificates of Deposit)** – The district may invest in instruments issued by financial institutions that state that specified sums have been deposited for specified periods of time and at specified rates of interest. Except to the extent insured by the Federal Deposit Insurance Corporation (FDIC), the certificates of deposit are required to be backed by acceptable collateral securities as described in § 30.270, RSMo., or insured (in whole or in part) by the FDIC.

Federal law provides that a depositor's security agreement that tends to diminish or defeat the interest of the FDIC in an asset acquired by it as receiver of an insured depository shall not be valid against the FDIC unless the agreement:

- Is in writing;
- Was approved by the board of directors of the depository or its loan committee; and
- Has been continuously, from the time of its execution, an official record of the depository institution;

- g. **Bankers' Acceptances** – The district may invest in bills of exchange or time drafts drawn on and accepted by a commercial bank, otherwise known as bankers' acceptances. The district may invest in bankers' acceptances issued by domestic commercial banks possessing the highest rating issued by a nationally recognized statistical rating organization. Purchases of bankers' acceptances may

not exceed 180 days to maturity. No more than 75 percent of the portfolio may be invested in a combination of bankers' acceptances and commercial paper.

- h. Commercial Paper – The district may invest in commercial paper issued by domestic corporations that have received the highest rating issued by a nationally recognized statistical rating organization. Eligible paper is further limited to issuing corporations that have a total commercial paper program size in excess of \$250,000,000. No more than 75 percent of the total market value of the portfolio may be invested in the combination of commercial paper and bankers' acceptances. Commercial paper issues must be subject to periodic credit reviews and daily monitoring of news research and analysis, and a monitoring program must be established to promulgate best practices credit monitoring.

2. United States Agency Security Selection

The following list represents the entire range of United States Agency Securities that the district will consider and that shall be authorized for the investment of funds by the district. Additionally, the following definitions and guidelines should be used in purchasing the instruments:

- a. U.S. Government Agency Coupon and Zero Coupon Securities – Bullet coupon bonds with no embedded options with maturities of five years or less.
- b. U.S. Government Agency Discount Notes – Purchased at a discount with maximum maturities of one year.
- c. U.S. Government Agency Callable Securities – Restricted to securities callable at par only with final maturities of five years or less.
- d. U.S. Government Agency Step-Up Securities – The coupon rate is fixed for an initial term. At coupon date, the coupon rate rises to a new, higher, fixed term. Restricted to securities with final maturities of five years or less.
- e. U.S. Government Agency Floating Rate Securities – The coupon rate floats off one index restricted to coupons with no interim caps that reset at least quarterly.
- f. U.S. Government Mortgage Backed Securities – Restricted to securities with final maturities of five years or less.

3. Investment Restrictions and Prohibited Transactions

To provide for the safety and liquidity of the district's funds, the investment portfolio will be subject to the following restrictions:

- a. Borrowing for investment purposes ("leverage") is prohibited.
- b. Instruments known as variable rate demand notes, floaters, inverse floaters, leveraged floaters and equity-linked securities are not permitted. Investment in any instrument that is commonly considered a derivative investment (e.g., options, futures, swaps, caps, floors and collars) is prohibited.
- c. Contracting to sell securities not yet acquired in order to purchase other securities for the purpose of speculating on developments or trends in the market is prohibited.
- d. No more than five percent of the total market value of the portfolio may be invested in bankers' acceptances or commercial paper issued by any one issuer.

4. Collateralization

Collateralization will comply with the requirements of FIRREA. Collateralization will be required on two types of investments:

- a. Certificates of Deposit. In order to anticipate market changes and provide a level of security for all

funds, the market value (including accrued interest) of the collateral shall be at least 100 percent or the greater of the amount of certificates of deposit plus demand deposits with the depository, less the amount, if any, that is insured by the FDIC or the National Credit Unions Share Insurance Fund.

All securities that serve as collateral against the deposits of a depository institution must be safekept at a non-affiliated custodial facility. Depository institutions pledging collateral against deposits must, in conjunction with the custodial agent, furnish the necessary custodial receipts within five business days from the settlement date.

The district will have a FIRREA-compliant depository contract and pledge agreement with each depository. This will ensure that the district's security interest in collateral pledged to secure deposits is enforceable against the depository.

b. Repurchase Agreements

The securities for which repurchase agreements will be transacted will be limited to United States Treasury and United States Government Agency securities that are eligible to be delivered via the Federal Reserve Fedwire book entry system. Securities will be delivered to the district's designated custodial agent. Funds and securities will be transferred on a delivery vs. payment basis. In addition to the collateral requirements above, the district shall also have in place a Master Repurchase Agreement and Custodian Bank Agreement to hold such securities.

VI. Investment Parameters

1. Diversification

The investments shall be diversified to minimize the risk of loss resulting from overconcentration of assets in specific maturity, specific issuer, or specific class of securities. Diversification strategies shall be established and periodically reviewed. At a minimum, diversification standards by security type and issuer shall be:

- a. U.S. Treasury securities having principal and/or interest guaranteed by the U.S. government – 100 percent
- b. Collateralized time and demand deposits – 100 percent
- c. U.S. government agencies, instrumentalities and government-sponsored enterprises – No more than 70 percent
- d. Collateralized repurchase agreements – No more than 75 percent
- e. U.S. government agency callable securities – No more than 50 percent
- f. Commercial paper and bankers' acceptances – No more than 75 percent combined

2. Maximum Maturities

To the extent possible, the district shall attempt to match its investments with anticipated cash flow requirements. Investments in repurchase agreements shall mature and become payable not more than 90 days from the date of purchase. Investments in bankers' acceptances and commercial paper shall mature and become payable not more than 180 days from the date of purchase. All other investments shall mature and become payable not more than five years from the date of purchase. The district shall adopt weighted average maturity limitations that should not exceed three years and are consistent with the investment objectives.

VII. Reporting

1. Methods

The investment officer shall prepare an investment report at least quarterly, including a management summary that provides an analysis of the status of the current investment portfolio and transactions made over the last quarter. This management summary will be prepared in a manner that will allow the

district to ascertain whether investment activities during the reporting period have conformed to the investment policy. The report should be provided to the governing body of the district. The report will include the following:

- Listing of individual securities held at the end of the reporting period;
- Realized and unrealized gains or losses resulting from appreciation or depreciation by listing the cost and market value of securities over a one-year duration (in accordance with the Government Accounting Standards Board (GASB) 31 requirements). [Note: This is only required annually.]
- Average weighted yield to maturity of portfolio on investments as compared to applicable benchmarks;
- Listing of investment by maturity date;
- Percentage of the total portfolio that each type of investment represents;

2. Performance Standards

The investment portfolio will be managed in accordance with the parameters specified within this policy. The portfolio should obtain a market-average rate of return during a market/economic environment of stable interest rates. A series of appropriate benchmarks may be established against which portfolio performance shall be compared on a regular basis.

Investments should be reviewed for possible sale if the securities are downgraded below the minimum acceptable rating levels.

3. Marking to Market

The market value of the portfolio shall be calculated at least quarterly and a statement of the market value of the portfolio shall be issued at least annually to the board. This will ensure that review of the investment portfolio, in terms of value and price volatility, has been performed.

VIII. Policy Considerations

1. Exemption

Any investment currently held that does not meet the guidelines of this policy shall be exempt from the requirements of this policy. At maturity or liquidation, such moneys shall be reinvested only as provided by this policy.

2. Adoption

This policy shall be reviewed annually by the investment officer, and recommended changes will be presented to the board for consideration.

Administrative Procedure DJF-1-AP(1): PURCHASING

Status: DRAFT

Original Adopted Date: 11/14/2002 | Last Revised Date: 11/16/2023 | Last Reviewed Date: 11/16/2023

25A UPDATE EXPLANATION

MSBA has updated this procedure to keep pace with changes to federal programs finance, operations, and compliance.

The U.S. Office of Management and Budget (OMB) updated its federal program rules in Title II of the Code of Federal Regulations on April 22, 2024, with an effective date of October 1, 2024 (unless a federal agency elects to use an earlier date not prior to July 1, 2024). The OMB's massive rewrite of the rules (89 Fed. Reg. 30046) is to improve federal financial assistance management, transparency, and oversight through more readily accessible and comprehensible guidance.

The Department of Elementary and Secondary Education (DESE) "Fiscal Guidance for Federal Grant Programs" (posted at <https://dese.mo.gov/media/pdf/general-federal-guidance> and last updated in April 2023) requires districts that receive federal funds to comply with federal policies established by legislative or executive authority. Under the guidance, "Subgrantees/recipients must have policies and procedures to implement and perform these requirements. They are to be reviewed as part of an audit of each state and local government or other entity which receives federal financial assistance."

Separately, the U.S. Court of Appeals for the Eighth Circuit validated an Arkansas statute against doing business with entities that boycott Israel. Missouri has a similar statute that is also presumably validated by the Court of Appeals' decision in *Arkansas Times LP v. Waldrip*, 37 F.4th 1386 (8th Cir. 2022). Districts must get certification from covered contractors that they do not boycott goods or services from the State of Israel, except for contracts of less than \$100,000 or with contractors who have fewer than ten employees.

The OMB 2024 changes took effect on October 1, 2024. A DESE guidance document incorporating the 2024 OMB revisions has not been published. However, MSBA consulted DESE before drafting this update in an effort to avoid any future program review issues.

The district operates using funds collected from taxpayers for the benefit of the district's education program, and it is imperative that all board members and district employees strictly adhere to district policies and procedures when making purchases for the district.

Laws Regarding Federal Awards

In addition to the requirements of policy DJF and this procedure, when a purchase involves federal funds or a federal award, the rules detailed in policy DJFA and related procedures must also be followed.

Definitions

Competitive Bidding – A process of obtaining products or services where the district contacts providers or advertises, and interested providers submit quotes, offers, bids, or sealed bids from which the district chooses. Competitive bidding may include the solicitation and submission of offers electronically or through a web-based system. The requirement for providers to submit sealed bids is one type of competitive bidding.

Competitive Negotiation – A process of obtaining a contract for products or services where the district contacts providers or advertises a request for proposals (RFP) detailing the scope, specifications, terms, and conditions of the proposed contract and the criteria on which the proposals will be analyzed, then negotiates separately with each responsive provider to award the contract.

Debarred – Exclusion from state or federal government contracting and subcontracting for products or services.

Funding Agency – Typically a grant provider, such as a state or federal government agency, which may have additional rules in place for approvals, procedures, fund use, or other special conditions connected to the grant or funds.

Lowest or Best Bid or Offer – The provider with the best product or service based on district criteria that may include price, value, quality of product, history of performance, recommendations, and other qualities important to the

district.

Products – All physical property other than real estate including, but not limited to, supplies, books, furniture, machinery, and equipment.

Provider – A vendor of products or an independent contractor providing services to the district.

Purchase – Obtaining or procuring products or services for the district in exchange for money or anything of value.

Purchasing Card – A credit card in the district's name on which the district has placed automatic restrictions such as the amount that can be charged per day, where the card may be used or the type of purchases that can be made with the card.

Sealed Bids – A form of competitive bidding in which providers submit offers in a sealed envelope or package that is publicly opened at an advertised place and time or submit offers using a web-based system that protects the confidentiality of each submitted bid until the date and time of the bid opening.

Services – All providers of labor or professional expertise other than that provided by district employees in the scope of their duties including, but not limited to, services such as construction, auditing, bond underwriting, consulting, legal services, janitorial services, and food services.

Purchasing Supervision

The chief financial officer will serve as the district's purchasing officer or will designate a purchasing officer. The district purchasing officer will supervise district purchasing and may authorize purchases on behalf of the district that conform to the board-adopted budget.

General Rules

1. All funds received by district staff on behalf of the district shall be deposited in district accounts. All funds deposited with the district, regardless of source, are considered district funds. Any purchases made with these funds must comply with district policies and procedures.
2. Although buildings, departments, and divisions are allocated budgets for a given period, the expenditure of those budgetary amounts is still subject to law and district policies and procedures.
3. No contract will be entered into or bill paid without the proper documentation and an affirmative vote from a majority of the whole board. Even without a contract, no unbudgeted purchase will be made without prior board approval except in accordance with the Emergency Situations subsection of this procedure.
4. Regardless of the purchase method used, the district will select the lowest or best bid or offer. The district reserves the right to waive minor technical defects in a bid, reject any and all bids, reject any part of a bid, advertise for new bids, or make the purchase on the open market if the product or service can be obtained at a better price. If the scope of the purchase changes substantially, the district will rebid the product or service unless this procedure specifically provides otherwise.
5. Purchases may be made only through a purchase order, credit or purchasing card, or through petty cash, when appropriate. In rare circumstances when one of these methods of payment is not available, the district may reimburse an employee for a purchase made with the employee's personal funds. Employees should contact the district business office prior to making a purchase outside the authorized methods to ensure reimbursement.
6. All purchases must receive approval from the principal or other appropriate supervisor responsible for the budget code from which the purchase is made. The principal or supervisor will compare requests to prevent the purchase of duplicative or unnecessary items. The following items require additional approval prior to making the purchase, regardless of the cost:
 - Computer hardware and software must be approved by the district's technology director.
 - Products, services, or anything else purchased with grant funds must be approved by the person designated as the grant administrator.

- Construction or maintenance of district facilities must be approved by the district's facilities director.
 - The purchasing officer must approve travel expenses such as airline tickets and hotel reservations.
7. All purchases must be attributed to a budget code, and funds must be available in that code prior to making the purchase. Federal funds will be identified in accordance with the district's procedure for cash management of federal funds.
 8. If the requested expenditure does not fit into a budget code or would go beyond the approved amount in that budget code, the request will be forwarded to the superintendent's office for review. If the superintendent determines that the request is reasonable but will require an amendment to the current budget, the superintendent will include the request as an agenda item at the next board meeting.
 9. All purchases must be appropriately documented consistent with auditing guidelines and this procedure.
 10. District staff will provide the district's tax-exempt letter to vendors before making any purchase that may be taxed.
 11. Purchase orders will expire within three months of the date of issuance if not redeemed.

Informal Purchasing Methods

Micro-Purchases

Purchases under \$10,000, or micro-purchases, can be made without soliciting competitive price or rate quotations when doing so does not violate state or federal law and when the purchasing officer considers the price to be reasonable based on research, experience, purchase history, or other information and documents the purchasing officer files accordingly to support its conclusion. To the maximum extent possible, purchases made using the micro-purchasing method should be distributed equitably among qualified providers.

Small Purchases Simplified Acquisitions (Quotations)

If the estimated expenditure is more than \$10,000 but less than \$50,000, the employee authorized to make the purchase must:

1. Notify the purchasing officer of the needed purchase. The purchasing officer may send electronic notices of the proposed purchase to all providers on the district provider list. The purchasing officer may decide to directly conduct or oversee the purchase or allow the authorized employee to conduct the purchase.
2. Obtain bids, quotes, or offers from an adequate number of qualified sources, which the district establishes to be at least three providers, unless the purchasing officer determines otherwise. The employee may solicit bids, quotes, or offers directly from providers and may utilize bids, quotes, or offers received by fax, telephone, and email. In addition, the employee may use catalogs and websites to make comparisons.
3. Document instances where fewer than three providers sell or provide the service or product and consult the available provider(s).
4. Provide the purchasing officer with the proper documentation, including documentation of which the chosen provider was chosen and the reasons for selecting that provider.

Formal Purchasing Source-Selection Methods (Purchases in Excess of \$50,000)

Either sealed bids or proposals will be used for any purchase of products or services that may be in excess of \$50,000 unless noncompetitive purchasing is authorized by law, policy, or this procedure.

Sealed Bids Source-Selection Method

Sealed bid specifications will include a clear and accurate description of the technical requirements for the material, product, or service desired and will identify all requirements and all other factors that will be used in evaluating bids.

or proposals. When it is impractical or uneconomical to make a clear and accurate description of the technical requirements, a "brand name or equivalent" description may be used as a means to define the performance or other salient requirements of procurement.

Sealed bids will be used only when:

1. A complete, adequate, and realistic purchase description (for example, bid specifications, product description, brand name, or equivalent) is available;
2. Considering market conditions and the product or service to be acquired, the district expects that ~~Two or more responsible bidders have been identified as willing and able to compete effectively for the business;~~ and
3. The purchase lends itself to a firm, fixed-price contract, and the selection of the bidder can be made primarily based on the basis of price.

The purchasing officer will directly conduct or oversee the sealed bid process below:

1. If the expenditure is for construction, the district will follow the bidding requirements of the funding agency and state and federal law.
2. For nonconstruction invitations to bid, at least five business days before the bids are to be opened, the purchasing officer will advertise the proposed purchase in a newspaper or through an electronic medium available to the general public. The purchasing officer will send electronic notices of proposed purchases to all businesses on the district's provider list. In addition, the district may also directly solicit sealed bids from providers.
3. The invitation for bids must define the items or services with specific information, including any required specifications, for the bidder to properly respond.
4. It is the bidder's responsibility to ensure that bids are received by the district no later than the appointed date and hourtime. Late bids will not be considered and will be returned unopened to the bidder.
5. The purchasing officer or designee will publicly open all bids received and will maintain all documentation of the purchase, including which provider was chosen and the reasons for selecting that provider. The district must document and provide justification for all bids it rejects.
6. If the purchasing officer has received bids in accordance with this procedure and later finds the same product or service at a lower cost through a catalog or an online vendor that did not submit a bid, the purchasing officer may advise the board to reject all sealed bids and purchase through the catalog or online vendor, unless formal or sealed bidding is required by law.

Proposals and Qualifications Source-Selection Method

RFPs and requests for qualifications (RFQ) may be solicited when another method is not required by law or the funding agency and the conditions are not appropriate for using sealed bids ~~are not met.~~

Unless otherwise required by law, at least five business days before the proposals are due, the purchasing officer will advertise the proposal in a newspaper or through an electronic medium available to the general public. The purchasing officer will send electronic notices of proposed purchases to all vendors on the district's provider list for the relevant goods and/or services, if any list is kept. The district may also send the RFP or RFQ to known sources who may be interested. Proposals must be solicited from multiple qualified entities.

The district will state in the RFP or RFQ the factors or criteria that district evaluator(s) will use to evaluate the responses (for example, efficiency in meeting the district's needs, firm qualifications, personnel qualifications, references, district costs, delivery schedule, and compatibility with existing systems or capacities of the district). All evaluation factors and their relative importance must be identified. The evaluation of the proposals and the selection of the provider shall be conducted in a manner that results in a fair comparison of the proposals. To the maximum extent practicable, any proposals submitted in response to the public notice must be considered.

The district will select the lowest or best offer as determined by the evaluation criteria established in the RFP or RFQ and any subsequent negotiations. In determining the lowest or best offer, negotiations may be conducted with

responsive providers for the purpose of understanding and clarifying the proposal and verifying that the proposal responds to the district's needs. All providers submitting proposals shall be accorded fair and equal treatment with respect to any opportunity for negotiation and subsequent revision of proposals. Revisions may be permitted after submission and before award for the purpose of obtaining best and final offers. The purchasing officer shall have the right to reject any or all proposals and advertise for new proposals or purchase the required products or services on the open market if they can be obtained at a better price.

Noncompetitive Purchasing

Noncompetitive purchasing may be used when, after solicitation from multiple sources, there is inadequate competition or when authorized in writing by the funding entity. In addition, the following purchasing alternatives may be used if it is in the district's best interest and fiscally prudent.

1. Single Source or Unique Circumstance Purchases

The purchasing officer may waive the requirement of competitive bids or proposals after determining in writing that there is only a single feasible source for the purchase. Immediately upon discovering that other feasible sources exist, the purchasing officer shall rescind the waiver and proceed to procure the products or services through the competitive process as described in this procedure. A single feasible source exists in any of the following circumstances:

- Products or services are proprietary and available only from the manufacturer or a single distributor.
- Based on past procurement experience, it is determined that only one distributor services the region in which the products or services are needed.
- Purchases are available at a discount from a single distributor for a limited period of time, and the discount is significant based on the current market price and/or the last price paid for the product or service.
- Specific parts or authorized maintenance must be utilized to maintain validity of a warranty.
- The services of a particular provider are unique, such as speakers on a particular topic or authors.

2. Approved Providers

In some circumstances where products and services are routinely needed, the purchasing officer may competitively bid or negotiate for the product or service for use throughout the school year, based on past usage of the product or service. Such circumstances include, but are not limited to, the purchase of food, textbooks, office supplies, or services such as bus maintenance or plumbing. The purchasing officer will use the single source purchasing process for unique products or services. Once a provider has been approved, district employees may purchase the designated products or services from the approved provider without additional competitive bidding.

Before designating approved providers, the purchasing officer will first determine that the district will receive quality products and services from the providers at a reasonable cost to the district. The purchasing officer will review and redesignate approved providers annually to ensure that the prices of the products and services provided remain competitive. Textbook providers will be designated as approved providers only if all statutory requirements are met. Approved providers may be designated at any time.

3. Cooperative Purchasing

Cooperative purchasing, including local and state intergovernmental agreements, should be utilized when it is determined to be to the financial advantage of the district. Before joining a cooperative purchasing program, the purchasing officer will conduct an analysis to determine whether the cooperative purchasing program will result in a cost savings to the district based on the district's history of expenditures. This analysis will be conducted on an annual basis to determine whether the district should continue to participate in the program.

4. Real Estate Brokers and Other Real Estate Services

In situations where the district will discuss or make decisions regarding the lease, purchase, or sale of real

estate in closed session as allowed by law, the district is not required to publicly advertise and seek sealed bids for the services of a licensed real estate broker or other services incident to the sale, regardless of the ultimate cost of the service provided. Instead, the purchasing officer will contact at least two service providers to obtain bids or quotes for services and make a recommendation to the board, or the district may contract with a real estate broker or other service provider that has previously provided services to the district. This exception does not apply to services required to be publicly bid by law, such as construction services, or other services for which there is a specified selection process in law or policy, such as architectural, engineering, and land surveying services.

5. Contracted Representatives

The district may contract with representatives to manage the procurement of goods and services if the purchasing officer determines that use of a representative is financially prudent. In those situations, the procurement process used by the representative may deviate from the district's procedures as long as if there is no violation of law and there is no intent to circumvent competition.

6. Emergency Situations

Unless competitive bidding is required by law, the superintendent may waive the requirement of competitive bids or proposals after determining that there exists a threat to life, property, public health, or public safety or when immediate expenditure is necessary to protect against further loss of or damage to property or prevent or minimize a serious disruption in services.

Emergency purchases shall be made with as much competition as is practical under the circumstances, which may include calling known providers to obtain a quote or emailing vendors on the provider list and requiring an immediate response. Emergency purchases will be made only to the extent necessary to alleviate the emergency.

Leasing, Renting, or Lease-Purchasing

Lease, rent, or lease-purchase arrangements are subject to competitive bidding requirements in the same manner as other purchases. The board may purchase apparatus, equipment, and furnishings by entering into lease-purchase agreements with providers. Any agreement that results in school district ownership of the leased object must contain a provision that allows the district an option to terminate the agreement on at least an annual basis without penalty. All expenditures related to lease-purchase agreements shall be considered expenditures for capital outlay.

Legal Compliance

In addition to the bidding requirements of this procedure, the district will comply with all laws with respect to acquiring products and services including, but not limited to, the following:

1. Unless a delivery method is used that provides for a different source selection method for some or all portions of a project, all construction projects that may exceed an expenditure of \$50,000 shall be advertised in a newspaper of general circulation and competitively bid, in accordance with law, and may also be advertised in business, trade, or minority newspapers or by using other modes of communication, such as the district's website. Bid specifications and contracts for construction projects will include all elements required by law including, but not limited to, a requirement to pay the prevailing wage or public works contracting minimum wage, mandatory training, mandatory affidavits regarding the employment of authorized labor, and bonding requirements when applicable. See §§ 107.170, 177.086, 285.530, 290.210 - .340, 292.675, RSMo.
2. All purchasing of architectural, engineering, or land surveying services must be solicited and selected in accordance with board policy and law. See §§ 8.285 - .291, RSMo.
3. Construction management, construction manager at risk, and design-build contractor services must be solicited and selected in accordance with board policy and law. See §§ 8.675 - .687, 67.5050, .5060, RSMo.
4. The district must competitively solicit auditing services and select an auditor who meets the qualifications set by the Department of Elementary and Secondary Education (DESE). See 5 C.S.R. § 30-4.030.
5. Health and life insurance contracts will be competitively bid at least every three years. See § 67.150, RSMo.

6. General liability and other forms of insurance contracts will be competitively bid at least every six years. See § 376.696, RSMo.
7. Depositories of district funds will be competitively bid at least every five years. See §§ 165.201 - .291, RSMo.
8. The selection of food service management companies will be made in accordance with procurement requirements in state and federal law. See 7 C.F.R. § 210.16; 5 C.S.R. § 30-680.010.
9. When purchasing services using federal E-Rate Funds, the district will comply with federal law detailing the procurement process. See 47 C.F.R. § 54.503.
10. Transactions with school board members or employees, their spouses, dependent children in their custody, and businesses they are associated with will only be conducted only as required allowed by law and board policy. See §§ 105.454, .458, 171.181, RSMo.
11. As a condition for the award of a contract to provide the district services in excess of \$5,000, the provider must submit a sworn affidavit and documentation affirming enrollment in E-Verify and stating that the provider does not knowingly employ any person who is not authorized to work in the United States. See § 285.530, RSMo.
12. The district shall not contract with or otherwise use the services of an independent contractor for any work that regularly requires teacher or administrator certification by law. See § 161.855, RSMo.
13. The district will not enter into a contract with a company to acquire or dispose of services, supplies, information technology, or construction unless the contract includes a written certification that the company is not currently engaged in and shall not, for the duration of the contract, engage in a boycott of goods or services from the State of Israel; companies doing business in or with Israel or authorized by, licensed by, or organized under the laws of the State of Israel; or persons or entities doing business in the State of Israel. This section shall not apply to contracts with a total potential value of less than \$100,000 or to contractors with fewer than ten employees. See § 34.600, RSMo.

Purchasing Preferences

In accordance with law, the district will comply with all purchasing preference requirements in this section. Purchases made with federal funds must also comply with the requirements of policy DJFA and, in the case of conflict among the requirements, the provisions of DJFA will govern such purchases.

1. When contracting for any job or service, the district will give preference to Missouri businesses, or businesses that maintain Missouri offices or places of business, when the quality of performance promised is equal to or better than and the price quoted is the same as or less than that of the other responsive providers. See § 34.073, RSMo.
2. The district will give preference to all commodities manufactured, mined, produced, or grown within the state and to all Missouri firms, corporations, or individuals who supply commodities when quality and price are approximately the same. See § 171.181, RSMo.
3. The board encourages district staff to purchase products manufactured, assembled, or produced in the United States of America. See § 34.353, RSMo.
4. The district will purchase, to the maximum extent practicable, domestic commodities or products for its nutrition program. As required by U.S. Department of Agriculture (USDA) Buy American rules, the district will purchase, to the maximum extent practicable, domestic commodities or products for its nutrition program. "Domestic commodity" means an agricultural commodity that is produced in the United States of America, and "domestic product" means a food product that is processed in the United States of America substantially using agricultural commodities that are produced in the United States of America. See 7 C.F.R. §§ 210.21, 220.16.
5. When contracting for any job or service, the district will give a three-point bonus preference to service-disabled veteran businesses that are Missouri businesses or businesses that maintain Missouri offices or places of business. See § 34.074, RSMo.
6. When purchasing food or beverages to be processed or served in a building or room owned or operated by the

district, the board will give preference to those that contain a higher level of calcium if they are equal or lower in price and of the same type and nutritional quality. This consideration is in addition to any requirements of the ~~U.S. Department of Agriculture~~ **USDA** under the National School Lunch Program or the School Breakfast Program. See § 34.375, RSMo.

7. When purchasing coal for fuel purposes, the district must purchase coal mined in the state of Missouri or an adjoining state, if the cost is not greater than the cost of coal mined in any other state or states, including the cost of transportation. See § 34.080, RSMo.
8. Employees responsible for the purchase of cleaning products will consult DESE guidelines on environmentally friendly products prior to purchase. See § 161.365, RSMo.
9. ~~The district may use discretionary locally sourced food preferences as permitted by USDA procurement regulations. See 7 C.F.R. § 210.21(g).~~

Provider Lists

The purchasing officer or designee will maintain lists of providers interested in receiving electronic notices of proposed district purchases. Any provider may request to be added to the list. It is the provider's responsibility to update contact information.

The purchasing officer will not include providers who have been suspended or debarred at the state or federal level, and the purchasing officer will remove providers when the district discovers that the provider has been suspended or debarred. The purchasing officer may remove providers from the provider list if they have not submitted a bid or proposal in more than one year or have proven to be unreliable or unqualified. The purchasing officer will attempt to notify removed vendors using the last known email address.

Debarred or Suspended Providers

The district will not do business with providers who have been suspended or debarred on a state or federal level. If the district is currently under contract with a provider who becomes suspended or debarred, the district will comply with all legal obligations to the provider, but will not do business with the provider in the future until the provider is no longer suspended or debarred.

The purchasing officer will monitor the state and federal information regarding suspension and debarment and will immediately notify staff members if a provider with whom the district regularly does business is suspended or debarred. Before making purchasing decisions, district staff will consult the purchasing officer for confirmation that the desired provider is in good standing.

Purchase Documentation

Documentation related to purchases must be maintained in accordance with the Missouri Secretary of State's retention manual and maintained in a centralized location so that there is a clear audit path linking the solicitation, evaluation, award, and payment. When applicable, documentation should include:

1. A statement justifying the purchasing method used (micro, small, sealed bids, RFP, or RFQ).
2. Bid specifications or scope of work requirements for an RFP or RFQ.
3. Newspaper advertisements or posted notices.
4. List of providers contacted.
5. Original or copy of each written bid, proposal, or statement of qualifications received.
6. Bid record/tabulation summary sheets.
7. Correspondence concerning the purchase.
8. Evaluation report, including an explanation if the bid accepted was from someone other than the low bidder.

9. Description of the emergency condition that existed if bids were obtained due to an emergency situation.
10. Rationale for a single feasible source purchase.
11. An explanation if the bid accepted was from a non-Missouri manufacturer or service provider.

Receiving Products

All district buildings will have a designated receiving area where all products are delivered. Each building supervisor/administrator will designate two employees who will sign for products received at that building. An employee will not sign for receipt of a product that the employee requisitioned or ordered. Therefore, all employees must notify the employees designated to receive products when an item is ordered. However, if there is a question as to whether the product was ordered or there is a mistake in the order, the employee ordering the product will be consulted prior to consenting to the delivery. The designated employee will verify that sales tax was not charged before giving consent to a delivery.

As soon as possible after receipt of a product, the employee who ordered it will inspect the product to ensure that the district received the appropriate quality and quantity of the product, that the product was delivered in a timely manner and that the price and quantity on the invoice matches the receipt. If the product is acceptable and the purchase was made by purchase order, the employee who ordered it will send proof of receipt to the purchasing officer so that the purchase order can be paid. If a partial shipment is received, the employee will send the receipt to the purchasing officer and will include notification that the entire order has not been received. If the purchase was made by credit or purchasing card, the employee issued the card will submit the receiving slip to the purchasing officer with the card statement. If the statement has already been paid prior to receipt, the employee issued the card will submit the receiving slip to the central office for documentation.

If the product is not what was ordered, the employee who ordered it will contact the provider immediately for correction. If the product cannot be replaced or the error corrected before the expiration of the purchase order, the employee will notify the purchasing officer immediately so that the first purchase order is canceled and a new purchase order is issued. If the provider refuses to correct the error, the employee will contact the purchasing officer immediately so that payment can be withheld or a protest filed with the credit or purchasing card issuer.

The building supervisor/administrator will designate one or more employees to verify all products received over the summer or in other situations where the employee who ordered a product is absent for an extended period of time. The person(s) designated will stand in place of the person ordering the product and perform the duties detailed above. The designated person(s) will attempt to notify the person who ordered the product, in addition to the purchasing officer, if there are any concerns.

All products received over the summer or in other situations where employees who ordered products are absent for an extended period of time will be stored in a secure, locked location and may be removed only by the employees who ordered the products or by other employees upon direction of the building supervisor/administrator or designee.

Receiving Services

In general, a service provider will be paid only after the employee who requested the service verifies that the service has been rendered in accordance with the specifications. Exceptions may be made for purchases such as membership dues, registration fees, and travel expenses such as airline tickets. Employees will contact the purchasing officer if there are concerns regarding the quality of the service provided or if the service is not completed in a timely manner.

Payment

Because by law the board must approve the payment of all bills, the purchasing officer will work with regular providers to arrange for a billing cycle that allows for official board approval before payment, and yet protects the district from incurring late fees or interest payments.

Policy DJFA: FEDERAL PROGRAMS AND PROJECTS

Status: DRAFT

Original Adopted Date: 08/18/2016 | Last Revised Date: 11/16/2023

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The OMB 2024 changes took effect on October 1, 2024. A DESE guidance document incorporating the 2024 OMB revisions has not been published. However, MSBA consulted DESE before drafting this update in an effort to avoid any future program review issues.

The purpose of this policy is to ensure that federally funded programs and projects in the district are administered in accordance with federal laws. Specifically, this policy governs all purchases of goods, property, and services using federal funds and reflects federal conflict of interest rules applicable to board members, employees, and agents involved with the selection of contractors and the approval and administration of contracts for federal programs and projects.

Definitions

Agent – A person or entity acting on behalf of the district who is not an employee of the district.

Contract – As used in this policy, a legal instrument by which the district purchases property or services needed to carry out a program or project; conducts procurement transactions funded by a federal award.

Contractor – A person or entity with which the district has an executed contract to carry out a federal program or project. A contractor does not include an entity with which the district contracts that received a federal award or subaward directly from a federal or state agency.

Gratuity – A favor, gift, or anything of monetary value.

Immediate Family – A spouse or dependent child of a board member, employee or agent or any person living in the household of a board member, employee, or agent.

Labor Surplus Area (LSA) Firm – A business located in a civil jurisdiction, such as a county or city, which is designated as an LSA by the U.S. Department of Labor's Employment and Training Administration.

Real, Apparent or Potential Conflict of Interest – A situation in which a board member, employee or agent; any member of a board member's, employee's or agent's immediate family; any business partner of a board member, employee or agent; or any organization that employs or is about to employ a board member, employee or agent has a financial or other interest in a firm the district is considering contracting with or would receive a tangible personal benefit from a firm considered by the district for contracting.

Federal Programs Administration

Federal programs administration must be in accordance with fiscal guidance for federal programs issued by the Missouri Department of Elementary and Secondary Education (DESE) Division of Financial and Administrative Services, guidance from the federal Office of Management and Budget (OMB), and Title 2 of the Code of Federal

Regulations unless otherwise advised by the district's attorney.

The superintendent shall be responsible for coordinating and administering federally funded programs and projects. The superintendent will ensure that the various departments operating these programs and projects do so in accordance with the requirements of the federal award and keep accurate and separate records, as required by board policy and in accordance with administrative procedures. The superintendent may delegate one or more duties to appropriate employees.

If the superintendent is not the purchasing officer for the district, the superintendent will work with the purchasing officer to ensure that goods and services purchased through federal awards comply with state and federal requirements.

District employees will not be discharged, demoted, or otherwise discriminated against as a reprisal for disclosing information that the employee reasonably believes is evidence of gross mismanagement of a federal contract or grant, a gross waste of federal funds, an abuse of authority relating to a federal contract or grant, a substantial and specific danger to public health or safety, or a violation of law, rule, or regulation related to a federal contract (including the competition for or negotiation of a contract) or grant, to:

1. A member of Congress or a representative of a committee of Congress;
2. An inspector general;
3. The Government Accountability Office;
4. A federal employee responsible for contract or grant oversight or management at the relevant agency;
5. An authorized official of the Department of Justice or other law enforcement agency;
6. A court or grand jury; or
7. A management official or other employee of the contractor, subcontractor, grantee, subgrantee, or personal services contractor who has the responsibility to investigate, discover, or address misconduct.

Employees who believe that they have been subjected to a prohibited reprisal may submit a complaint to the inspector general of the federal executive agency involved.

Procurement

In addition to following the requirements of state law, board policy, and district procedures, the purchasing officer will ensure that all supplies, equipment, property and services purchased with federal funds are purchased in accordance with federal law. No purchase will be made unless the purchase was authorized in the approved budget for administration of the grant. Every purchase will be identified in district accounts in accordance with the federal program under which the purchase was made.

Procurement Arrangements Using Strategic Sourcing

When appropriate for the procurement or use of common or shared goods and services, the district may enter into state and local intergovernmental agreements or inter-entity agreements for procurement transactions. These or similar procurement arrangements using strategic sourcing may foster greater economy and efficiency. Documented procurement actions of this type (using strategic sourcing, shared services, and other similar procurement arrangements) will meet the federal competition requirements for procurement transactions.

Solicitation of Bids and Proposals

All notices of solicitation of bids and proposals will include notice that the district encourages bids and proposals from minority businesses, women's business enterprises, service-disabled veterans, and labor surplus area firms.

Bids and Requests for Proposals

Bid specifications and requests for proposals will include a clear and accurate description of the technical requirements for the material, product, property, equipment, or service desired being procured and will identify all

requirements and all other factors that will be used in evaluating bids or proposals.

Bid specifications will not contain features that unduly restrict competition. The description may include a statement of the qualitative nature of the material, product or service to be procured and, when necessary, must set forth those minimum essential characteristics and standards to which it must conform if it is to satisfy its intended use. Detailed product specifications should be avoided if at all possible. When it is impractical or uneconomical to make a clear and accurate description of the technical requirements, a "brand name or equivalent" description may be used to define the performance or other requirements. The specific features of the named brand that must be met must be clearly stated.

Contractors who develop or draft specification requirements, statements of work or invitations for bids or requests for proposals for the district must be excluded from bidding on the project.

Pursuant to federal law, the district will not use local or state geographical purchasing preferences when purchasing goods or services related to a federal contract except when such preferences are mandated or encouraged under the applicable federal statutes. When making purchases with federal funds, the district will:

1. Take all necessary affirmative steps to ensure that small businesses, minority businesses, women's business enterprises and LSA firms are used when possible. To that end, the district will:
 - Place qualified small businesses, minority businesses and women's business enterprises on solicitation lists.
 - Solicit bids from small businesses, minority businesses and women's business enterprises when they are potential sources.
 - Divide total project requirements into smaller tasks or quantities, when economically feasible, to permit maximum participation by small businesses, minority businesses and women's business enterprises. This provision shall not be used to artificially divide purchases to avoid bidding requirements or design bid specifications to favor a particular provider.
 - Establish performance and delivery schedules that encourage small businesses, minority businesses and women's business enterprises to participate when doing so is conducive with the program or project.
 - Use the services and assistance, as appropriate, of such organizations as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.
 - Require the prime contractor to use the affirmative steps of this policy when selecting subcontractors.

The description may include a statement of the qualitative nature of the property, equipment, or service to be procured. When necessary, the description must provide minimum essential characteristics and standards to which the property, equipment, or service must conform. Detailed product specifications should be avoided if possible. When it is impractical or uneconomical to clearly and accurately describe the technical requirements, a "brand name or equivalent" description of features may be used to provide procurement requirements. The specific features of the named brand must be clearly stated. The district must identify any additional requirements the offerors must fulfill and all other factors that will be used in evaluating bids or proposals.

Contractors who develop or draft specifications, requirements, statements of work, or invitations for bids for the district must be excluded from competing on those procurements.

When making purchases with federal funds, the district will:

1. When possible, ensure that small businesses, minority businesses, women's business enterprises, veteran-owned businesses, and LSA firms are considered as set forth below. Such consideration means:
 - These business types are included on solicitation lists.
 - These business types are solicited whenever they are deemed eligible as potential sources.
 - Dividing procurement transactions into separate procurements to permit maximum participation by these business types. This provision shall not be used to artificially divide purchases to avoid bidding requirements or design bid specifications to favor a particular provider.

- Establishing delivery schedules that encourage participation by these business types.
 - Utilizing organizations such as the Small Business Administration and the Minority Business Development Agency of the Department of Commerce.
 - Requiring a contractor under federal award to apply this section of this policy to subcontractors.
2. Purchase only items that contain the highest practicable percentage of recovered materials, as defined by the Environmental Protection Agency (EPA), consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000.
 3. Use Procure solid waste management services in a manner that maximizes energy and resource recovery.
 4. Purchase, to the maximum greatest extent practicable; and consistent with law, provide a preference for the purchase, acquisition, or use of domestic goods, products, or materials produced in the United States (including, but not limited to, iron, aluminum, steel, cement, and other manufactured products). The requirements of this section must be included in all subawards, including all contracts and purchase orders for work or products under federal awards.
 5. The district should, to the greatest extent practicable and consistent with law, purchase, acquire, or use products and services that can be reused, refurbished, or recycled; contain recycled content; are biobased, or are energy and water efficient; and are sustainable.
 6. The district will avoid purchasing unnecessary or duplicate items and will take measures to design procurements to obtain a more economical purchase.
 7. The purchasing officer or designee may search state and federal surplus property offerings to determine whether any items the district needs are available at a lower cost without sacrificing quality.
 8. The district must perform a cost or price analysis for every procurement transaction, including contract modifications in excess of its simplified acquisition threshold.

Noncompetitive Purchasing

A Noncompetitive purchases can be awarded procurement method may be used only if one or more of the following circumstances applies:

1. The aggregate cost does not exceed the micro-purchase threshold in DJF-AP1.
2. The item is available only from procurement transaction can be fulfilled only by a single source.
3. A public exigency or emergency will not permit the delay caused that would result by publicizing resulting from providing public notice of a competitive solicitation.
4. The state or federal awarding entity expressly authorizes noncompetitive procurement in response to a written request submitted by the district.
5. After solicitation of numerous soliciting several sources, competition is determined inadequate.

Contracts

Contracts

The district will award contracts only to responsible contractors that possessing the ability to perform successfully under the terms and conditions of a proposed procurement contract. The district must consider contractor integrity, public policy compliance, proper classification of employees under the Fair Labor Standards Act, past performance record, and financial and technical resources when conducting a procurement transaction.

Time and Materials Contract

When making purchases using federal funds, the district will not use a time and materials contract unless there is a determination that no other contract is suitable, and the district includes a ceiling price that the contractor exceeds at its own risk, and the district oversees the project to ensure efficiency.

Value Engineering Clauses

The district may use value engineering clauses in contracts for construction projects of sufficient size to offer reasonable opportunities for cost reductions.

Disputes

The purchasing officer or designee will resolve contract and procurement disputes in accordance with good administrative practice and sound business judgment. The purchasing officer is authorized to contact the district's legal counsel for assistance in resolving disputes.

Procurement Records

The district will maintain records sufficient to detail the history of each procurement transaction. These records must include the rationale for the procurement method, contract type selection, contractor selection or rejection, and the basis for the contract price. The district will retain records as required by federal law.

Conflict of Interest

In addition to acting in accordance with Missouri laws governing conflicts of interest and financial disclosures, board members, employees, and agents participating in the procurement of property and services using federal funds must comply with federal requirements. In cases where federal requirements are more restrictive than state requirements, federal requirements will be followed.

1. Board members, employees, officers, and agents will not participate in the selection, award, or administration of a contract supported by a federal award if they have a real, or apparent or potential conflict of interest. Such a conflict of interest would arise when the employee, board member, employee, officer, or agent, or any member of their immediate family, their partner, or an organization that employs or is about to employ any of the parties indicated herein, has a financial or other interest in or a tangible personal benefit from a firm or an entity being considered for a contract.
2. The district will disclose any potential conflict of interest in accordance with the policy of the federal awarding agency.
3. Board members, employees, officers, and agents will not solicit or accept gratuities, favors, or anything of monetary value from contractors or parties to subcontracts but may accept unsolicited gifts of nominal value. For the purposes of this policy, a gift of nominal value is defined as an unsolicited gift of \$25 or less unless otherwise defined by federal law.
4. If the district has a parent, affiliate, or subsidiary organization that is not a governmental entity, the district will develop written standards to avoid conflicts of interest with these related organizations (organizational conflicts of interest). A conflict would exist in situations where the district is unable, or appears to be unable, to be impartial in conducting a procurement action involving the related organization because of the relationship with the organization.

Consequences

Board members, employees, and agents are required to immediately report any violation of this policy to the superintendent or board president. In accordance with federal law, the district will disclose to the state or federal agency that awarded the grant all violations of federal and criminal laws involving fraud, bribery, or a gratuity violation potentially affecting the federal award. The disclosure will be made in writing in a timely manner. The superintendent, designee, or board president will submit information about the violation to the state or federal awarding entity and will contact the district's attorney for assistance in making that report. See 2 C.F.R. §§ 200.113 and .318.

Unless excused by the board, board members who violate the provisions of this policy will be prohibited from holding a board office or representing the full board as an official spokesperson or otherwise. Employees who violate this

policy will be disciplined or terminated, and the district will reconsider and potentially end business relationships with agents who violate this policy. In addition, violations of this policy or the laws it references may be reported to law enforcement, the Missouri Ethics Commission, the Attorney General's Office³, or DESE and other applicable funding agencies.

**Administrative Procedure DJFA-AP(1): FEDERAL PROGRAMS AND PROJECTS -
(Managing Federal Funds—Allowable Expenses)**

Status: DRAFT

Original Adopted Date: 08/18/2016 | Last Revised Date: 11/16/2023

25A UPDATE EXPLANATION

MSBA has updated this procedure to keep pace with changes to federal programs finance, operations, and compliance.

The U.S. Office of Management and Budget (OMB) updated its federal program rules in Title II of the Code of Federal Regulations on April 22, 2024, with an effective date of October 1, 2024 (unless a federal agency elects to use an earlier date not prior to July 1, 2024). The OMB's massive rewrite of the rules (89 Fed. Reg. 30046) is to improve federal financial assistance management, transparency, and oversight through more readily accessible and comprehensible guidance.

The Department of Elementary and Secondary Education (DESE) "Fiscal Guidance for Federal Grant Programs" (posted at <https://dese.mo.gov/media/pdf/general-federal-guidance> and last updated in April 2023) requires districts that receive federal funds to comply with federal policies established by legislative or executive authority. Under the guidance, "Subgrantees/recipients must have policies and procedures to implement and perform these requirements. They are to be reviewed as part of an audit of each state and local government or other entity which receives federal financial assistance."

The OMB 2024 changes took effect on October 1, 2024. A DESE guidance document incorporating the 2024 OMB revisions has not been published. However, MSBA consulted DESE before drafting this update in an effort to avoid any future program review issues.

The purpose of this procedure is to ensure that federal funds received by the district are used in a manner consistent with underlying agreements, program objectives, the terms and conditions of federal awards, and federal law. The superintendent may delegate the responsibility for implementation of all or parts of this procedure to other appropriately trained employees. The superintendent or designee will utilize available resources from the Missouri Department of Elementary and Secondary Education (DESE) and the U.S. Department of Education to determine allowable costs and appropriate cost allocations.

Grant Development and Budget Process

During the development of any federal grant proposal and the accompanying budget, the superintendent or designee will include only those costs considered allowable as defined below. The superintendent or designee will determine the indirect cost rate and, to the extent possible, identify each item in the proposed budget as either direct or indirect, in accordance with law.

Allowable Costs

In order to be allowable, costs must be necessary and reasonable for successful implementation of the federal award. However, administrative closeout costs may be incurred until the due date of the final report(s). If incurred, these costs must be liquidated prior to the due date of the final report(s) and charged to the final budget period of the award unless otherwise specified by the federal agency. In addition, all costs must:

1. Be allocable to the federal award pursuant to the cost principles established by law;
2. Conform to any limitations or exclusions in law and specific to the award as to the type or amount of cost items;
3. Be consistent with state and district policies and procedures that apply uniformly to both federally financed and other district activities;
4. Be applied consistently (a cost that is applied as an indirect cost cannot be applied later as a direct cost for the same purpose under like circumstances);
5. Be determined in accordance with generally accepted accounting principles to the extent that those principles are applicable to school districts in Missouri;

6. Not be included as a cost or to meet the cost-sharing or matching requirements of any other federally financed program in either the current or a prior period;
7. Be adequately documented; and
8. Be incurred during the approved budget period.

Costs that are not allowable include, but are not limited to, alcoholic beverages, entertainment, goods or services for personal use, and payment of interest on the use of district funds.

Reasonable Costs

A cost is reasonable if it does not exceed an amount that which would be incurred by a prudent person would incur under the circumstances prevailing at the time when the decision was made to incur the cost, in both nature and amount. When determining whether a cost is reasonable, the superintendent or designee will consider the following:

1. Whether the cost is of a type generally recognized as ordinary and necessary for the operation of the district or the proper and efficient performance of the federal award;
2. The restraints and requirements imposed by such factors as of sound business practices, arm's-length bargaining, applicable laws and regulations, and the terms and conditions of the federal award;
3. Market prices for comparable goods or services costs for the geographic area;
4. Whether the individuals concerned acted with prudence in the circumstances considering their responsibilities to the district, its employees, the students, and the public at large, and the federal government; and
5. Whether the district significantly deviates cost represents a deviation from its the district's established practices and written policies and procedures for incurring regarding the incurrence of costs, which may unjustifiably increase the cost of the federal award.

Allocable to the Federal Award

A cost is allocable to the particular federal award if the goods or services involved are chargeable or assignable to the federal award's "other cost objectives" in accordance with the relative benefits received. This standard is met if the cost satisfies any of the following criteria:

1. Is incurred specifically for the federal award;
2. Benefits both the federal award and other district work and can be distributed in proportions that may be approximated using reasonable methods; and
3. Is necessary to the overall operation of the district and is assignable in part to the federal award in accordance with federal law these cost principles.

If the federal award benefits from indirect costs of the district, the district will receive an appropriate allocation for those indirect costs in accordance with law.

Applicable Credits

Transactions that offset or reduce direct or indirect costs, such as purchase discounts, rebates, or allowances; recoveries or indemnities on losses; insurance refunds or rebates; and adjustments of overpayments or erroneous charges must be credited to the federal award either as a cost reduction or cash refund, as appropriate.

Multiple Federal Awards

Any cost allocable to a particular federal award may not be charged to other federal awards (for example, to overcome fund deficiencies, or to avoid restrictions in federal law or the terms and conditions of the award, or for other reasons). However, the district may shift costs that are allowable under two or more federal awards in accordance with law and the terms and conditions of the federal awards.

If a cost benefits two or more projects or activities in proportions that can be determined without undue effort or cost, the cost must be allocated to the project based on the proportional benefit. If the work is so interrelated that the proportional benefit cannot be determined, the cost may be allocated on any responsible documented basis. If the contract is subject to the Cost Accounting Standards, those standards will apply when allocating costs take precedence.

Direct and Indirect Costs

Federal funds may be used to pay direct costs, but may only be used to pay indirect costs only to the extent that the indirect costs are within the established indirect cost rate and can be allocated to the federal award. The degree to which the cost is specifically identified with the federal award is the determining factor in distinguishing direct and indirect costs.

Costs incurred for the same purpose in like circumstances will be treated consistently as either direct or indirect. Salaries claimed as a direct cost may not also be claimed as an indirect cost.

Direct Costs

To determine whether a cost is direct, the superintendent or designee will consider the following factors:

1. Whether the cost can be identified with a specific federal award or other internally or externally funded activity;
2. Whether the cost can be directly assigned to such awards or activities relatively easily with a high degree of accuracy;
3. Whether the purchase was specifically authorized by the federal award in circumstances where the cost is for the purchase of equipment or other capital assets that may be used by the district for purposes not related to the federal award after the project or activity funded by the federal award has ended; and
4. When the cost is for the salaries of administrative or clerical staff, whether the:
 - Services of the administrative and clerical staff are integral to the project activity federal award;
 - Services of the administrative and clerical staff can be specifically identified with the project or activity federal award; and
 - Costs were explicitly included in the budget; and
 - District received prior written permission from the federal awarding agency to include the costs;
 - The costs are also not recovered as indirect costs.

Examples of direct costs are the compensation and fringe benefits of employees who work on the federal award or the costs of materials and supplies incurred for the federal award.

Indirect Costs

Indirect costs are those that do not meet the definition of a direct cost because they have been incurred for common or joint purposes and cannot be identified with a particular final cost objective without an effort that is disproportionate to the results achieved. Common indirect costs include general administrative costs, the cost of operating facilities, and depreciation on buildings and equipment. Federal funds may be used to pay for some indirect costs through an indirect cost allocation plan. The rate used to calculate the indirect costs depends on the type of grant.

Expenditures

All federal funds must be spent in accordance with the approved plan, budget, and expenditure report. Invoicing and approval of expenditures of federal money are governed by the district's policy and procedure for purchasing, including the requirement that all requests for payment be accompanied by documentation supporting the request.

Purchases using federal funds will not be approved without written confirmation from the superintendent or designee that the intended purchases are allowable.

Allowability of Compensation and Leave

Employee compensation will be paid using a federal award only if the compensation is reasonable for the services rendered and meets all other federal requirements for allowability. All employees who are paid with federal funds will be hired, compensated, and provided with leave and fringe benefits in accordance with the policies and procedures applicable to employees who are paid through nonfederal funds. If the services provided by the employee being compensated through a federal award are not comparable to any other position in the district, then that compensation, including benefits and leave, shall be in accordance with local market standards for the type of service performed.

The superintendent or designee will maintain accurate records of all compensation, including benefits, provided to employees who are paid with federal funds. If an employee is paid partially through a federal award, the records will specify the amounts paid through the federal award and those paid from other sources.

Certification

All proposals, reports, or requests for payment pertaining to any project or activity financed by federal funds shall be accompanied by a certification signed and dated by the superintendent or designee, in accordance with law.

**Administrative Procedure DJFA-AP(2): FEDERAL PROGRAMS AND PROJECTS -
(Managing Federal Funds—Cash Management)**

Status: DRAFT

Original Adopted Date: 08/18/2016 | Last Revised Date: 11/16/2023

25A UPDATE EXPLANATION

MSBA has updated this procedure to keep pace with changes to federal programs finance, operations, and compliance.

The U.S. Office of Management and Budget (OMB) updated its federal program rules in Title II of the Code of Federal Regulations on April 22, 2024, with an effective date of October 1, 2024 (unless a federal agency elects to use an earlier date not prior to July 1, 2024). The OMB's massive rewrite of the rules (89 Fed. Reg. 30046) is to improve federal financial assistance management, transparency, and oversight through more readily accessible and comprehensible guidance.

The Department of Elementary and Secondary Education (DESE) "Fiscal Guidance for Federal Grant Programs" (posted at <https://dese.mo.gov/media/pdf/general-federal-guidance> and last updated in April 2023) requires districts that receive federal funds to comply with federal policies established by legislative or executive authority. Under the guidance, "Subgrantees/recipients must have policies and procedures to implement and perform these requirements. They are to be reviewed as part of an audit of each state and local government or other entity which receives federal financial assistance."

The OMB 2024 changes took effect on October 1, 2024. A DESE guidance document incorporating the 2024 OMB revisions has not been published. However, MSBA consulted DESE before drafting this update in an effort to avoid any future program review issues.

The purpose of this procedure is to promote proper stewardship of taxpayer dollars by using fiscal control and fund accounting procedures that ensure proper disbursement of and accounting for federal funds. The superintendent may delegate the responsibility for implementation of all or parts of this procedure to other appropriately trained employees. The superintendent or designee will maintain a financial management system that meets the standards for fund control and accountability as required by federal law for the use of federal funds.

Requesting Federal Funds and Payment

The district will request a drawdown of federal funds using the system required by the Missouri Department of Elementary and Secondary Education (DESE) only after payment for the expenditure has been made. Authorized district personnel who submit a request for a disbursement of federal funds must identify the specific funds to be accessed, the type of expenditure, and the date on which payment was made.

~~To the extent~~ If available, funds from program income will be disbursed before additional cash drawdowns are requested. In situations where the district receives federal funds that do not reimburse the district for previous expenditures, those funds must be deposited and maintained in insured, interest-bearing accounts in accordance with law. Interest earned on those funds will be remitted to the federal government, through DESE, as required by law.

Financial Management

The district's financial management system will be sufficient to permit the preparation of reports required by the terms and conditions of the program federal award and for tracking expenditures to establish that funds have been used according to in accordance with federal statutes, regulations, and the terms and conditions of the federal award.

Identification

The superintendent or designee will, in all district accounts, identify all federal awards received and expended and the federal programs under which they were received. Revenues and expenditures will be separately identified with codes and must not be commingled with other state, federal, or local funds. Federal funds maintained in district accounts will be identified by the:

1. Catalog of Federal Domestic Assistance (CFDA) title and number;

2. Federal Award Identification Number (FAIN);
3. Fiscal year of the award;
4. Name of the federal agency;
5. Name of any pass-through entity involved; and
6. Project code used to identify grant expenditures.

Disclosure

The superintendent or designee will provide for accurate, current, and complete disclosure of the financial results of each federal award or program in accordance with federal reporting requirements.

Source and Application of Funds

The superintendent or designee will maintain records that clearly and sufficiently identify the amount, source, and expenditure of federal funds and the application of the funds for federally funded activities. These records must contain information pertaining necessary to identify federal awards, authorizations, obligations, unobligated balances, as well as assets, expenditures, income, and interest, and they All records must be supported by source documentation.

Control and Accountability

The superintendent or designee will maintain effective control over, and accountability for, all funds, property, and other assets. The district will must adequately safeguard all assets and ensure that they are used solely for authorized purposes, using effective internal controls as discussed below.

Budget and Expenditure Comparison

The superintendent or designee will routinely compare expenditures with the budgeted amount for each federal award. In addition, the superintendent or designee will submit a Final Expenditure Report (FER) to DESE on or before September 30 each year. The FER will reconcile what was submitted in the approved budget with the actual expenditures and obligations incurred for the school year. Expenditures will be reported by both object and function codes. Expenditures in approved object codes will not exceed ten percent of the total amount budgeted within each of the approved programs.

Internal Controls

The superintendent or designee will establish, document, and maintain effective internal controls over federal awards received that provide reasonable assurance that the district is managing the federal award in compliance with law and the terms and conditions of the award. The superintendent or designee will consult with DESE for compliance assistance when applicable.

The superintendent or designee will evaluate and monitor the district's compliance with statutes, regulations, and the terms and conditions of federal awards. If the superintendent or designee identifies instances of noncompliance, including noncompliance identified in audit findings, they will take prompt action and take steps to rectify the situation and bring the district into compliance.

As part of its internal control system, the superintendent or designee will establish reasonable cybersecurity and other measures to safeguard information, including protected personally identifiable information (PII) and other information. This also includes information the federal awarding agency or pass-through entity designates as sensitive or that the district considers sensitive consistent with applicable federal, state, and local laws regarding privacy and obligations of confidentiality, including the Family Educational Rights and Privacy Act (FERPA).

Budget

The approved budget for the federal award summarizes the financial aspects of the project or program as approved in the federal award process. The budget must be related to performance for program evaluation purposes whenever

appropriate.

Once the budget for any federal award has been approved, the district will report deviations from the budget, project scope, or objective and request prior approvals from the federal awarding agency or pass-through entity for revisions as listed below.

Non-Construction Awards

For non-construction awards, prior written approval or a waiver of that approval from the awarding federal agency or pass-through entity is required for one or more of the following program and budget-related reasons:

1. There is a change in the scope or the objective of the project or program, even if there is no budget revision.
2. A There is a change in key personnel (including employees and contractors) that are identified by name or position specified in the federal award application changes.
3. The project is suspended for more than three months or there is a 25 percent reduction in time and effort devoted to the project federal award over the course of the period of performance by the approved project director or, in the case of research awards, the principal investigator.
4. Costs that require prior approval are added, unless waived by the federal agency.
5. Funds will be transferred that were budgeted for participant support costs, such as stipends or travel expenses, will be transferred to other budget categories.
6. The district subcontracts out, transfers or contracts out for any work under the award that was not described in the application for the award, other than the acquisition of supplies, materials, equipment or general support services. Subaward activities not proposed in the application but approved in the federal award. A change of subrecipient requires prior approval only if the federal agency or pass-through entity includes the requirement in the terms and conditions of the federal award. This requirement does not apply to procurement transactions for goods and services.
7. There are changes to previously the total approved matching or cost-sharing provisions amount.
8. Additional federal funds are required to complete the project.
9. Transferring funds between the construction and non-construction work under a federal award.
10. There is a no-cost extension (meaning an extension of time that does not require the obligation of additional federal funds) of the period of performance, other than any one-time extension authorized by the federal agency.

Construction Awards

For construction awards, prior approval by the awarding federal agency is required for one or more of the following reasons:

1. A revision results in a change in the scope or objective of the project or program.
2. The need arises for additional federal funds to complete the project.
3. A revision involves specific costs for which prior written approval requirements may be imposed consistent with federal Office of Management and Budget (OMB) cost principles.

Reporting

The superintendent or designee will monitor activities under each program, function or activity funded by federal awards for compliance with applicable federal requirements and to ensure performance expectations are being achieved. Part of these monitoring activities includes providing performance reports as required by law, including accurate, current and complete disclosure of the financial results.

All reports will be submitted by required due dates and must be supported by appropriate documentation when necessary. The district will cooperate with state and federal authorities when monitoring or evaluating the district's performance.

Non-Construction Performance Reports

The superintendent or designee will submit performance reports at the interval required by the federal awarding agency or pass-through entity and in the manner directed under federal law. A copy of the reports will be provided to the board of education. Unless other information collections are approved by the U.S. Office of Management and Budget (OMB), these reports, for each federal award, will contain brief information:

1. Comparing actual project or program accomplishments to the performance goals and objectives of the federal award established for the reporting period, including quantified cost information and trend data when requested;
2. Explaining the reasons why established goals were not met, if appropriate; and
3. Providing additional pertinent information including, when appropriate, analysis, and explanation of cost overruns or higher-than-expected unit costs.

Construction Performance Reports

Construction performance reports will include on-site technical inspections, certified data showing the percentage of completion, and any other information requested by the awarding agency.

Significant Developments

The district may be required to make additional reports when events that have a significant development that could impact on the federal award occurs between the scheduled performance reporting due dates. In addition to scheduled and requested performance reports, the superintendent or designee will report the following to the federal awarding agency as soon as the conditions become known:

1. Problems, delays or adverse conditions that will materially impair the ability to meet the objective of the federal award. This disclosure must include a statement of the action taken or contemplated and any assistance needed to resolve the situation; and Significant developments include events that enable meeting milestones and objectives sooner or at less cost than anticipated, or that produce different beneficial results than originally planned.
2. Significant developments also include Problems, delays, or adverse conditions that will materially impair the district's or its subrecipient's ability to meet milestones or the objectives of the federal award. This disclosure must include a statement of the information on their plan for corrective action taken or contemplated and any assistance needed to resolve the situation; and.
3. Favorable developments that enable meeting time schedules and objectives sooner or at less cost than anticipated or producing more or different beneficial results than originally planned.

Records

The district will must mainretain all federal awardrequire records in accordance with law for a minimum of three years following submission of the FER. Records to be retained include, but are not limited to, financial records, supporting documentation, and statistical records. The records must be retained until all litigation, claims, or audit findings involving the records have been resolved and final action taken if any litigation, claim, or audit is started before the expiration of the three-year period. The district may be notified in writing by the federal awarding agency or pass-through entity, cognizant agency for audit, oversight agency for audit, cognizant agency for indirect costs, or pass-through entity to extend the retention period. The district will provide DESE access to all records regarding state and federal funds and will readily make records available to parents/guardians and the public upon request as required by federal and state law.

The federal agency or pass-through entity, inspectors general, the comptroller general of the United States, or any of their authorized represenorm audits, execute site visits, or for any other official use. This right also includes timely

and reasonable access to district personnel for the purpose of interviewing and discussions related to such documents or the federal award in general.

Audits

The district will conduct audits of federal funds when required by law or when an audit is required as a condition of the funds received.

Policy GBCBB: PROTECTED STAFF COMMUNICATIONS

Status: DRAFT

Original Adopted Date: 02/20/2020

25A UPDATE EXPLANATION

MSBA has updated this policy to reflect changes to the U.S. Code of Federal Regulations. The U. S. Office of Management and Budget (OMB) emphasized protections for federal programs whistleblowers by adding them to the 2024 OMB rewrite of the Code of Federal Regulations, Title II, Part 200, Subpart C, Pre-Federal Award Requirements and Contents of Federal Awards. MSBA now recommends districts add this new section on protected communications.

The district respects the opinions of district employees and will not take action against district employees solely for speech that is protected by state or federal law. The superintendent or designee may contact the district's attorney prior to taking disciplinary action to ensure compliance with these laws.

While there are numerous statutes, constitutional provisions, and court cases on this subject, this policy is intended to address only the requirements of § 105.055, RSMo.

Definitions

Disciplinary Action – Any dismissal, demotion, transfer, reassignment, suspension, reprimand, warning of possible dismissal, or withholding of work, regardless of whether the withholding of work has affected or will affect a district employee's compensation.

District Employee – Any employee, volunteer, intern, or other individual performing work or services for the district.

Employee Responsibilities

The district encourages district employees to be mindful of the impact their communication may have on the school district community and expects employees to take responsibility for their own communications regardless of whether the communication occurs while off duty or working. District employees are prohibited from representing their opinions as those of the district and are required to clarify, when necessary, when they are speaking as an individual and not as a representative of the district. All communications made by an employee while working for or representing the district must be professional.

Protected Communications

District administrators or supervisors will not prohibit an employee from discussing the operations of the district, either specifically or generally, with any member of the legislature, the state auditor, the attorney general, a prosecuting or circuit attorney, a law enforcement agency, the news media, members of the public, or any state official or body charged with the investigation of misconduct listed in this policy unless allowed by law.

Unless a disclosure is prohibited by law, neither the district nor its administrators and supervisors will prohibit a district employee from, or take disciplinary action against a district employee for, disclosing an alleged prohibited activity under investigation, any related activity, or any information the district employee reasonably believes to be evidence of:

1. A violation of any law, rule, or regulation;
2. Mismanagement;
3. A gross waste of district funds;
4. An abuse of authority;
5. Any violation of district policy;
6. A waste of public resources;
7. Any alteration of technical findings or communication of scientific opinion;

8. A breach of professional ethical canons; or
9. A substantial and specific danger to public health or safety.

All district employees and volunteers who have reasonable cause to suspect fraud must immediately report that suspicion to an administrator or supervisor pursuant to policy DA.

No administrator or supervisor shall require a district employee to provide notice prior to disclosing any activity listed above or prevent a district employee from testifying before a court or an administrative or legislative body regarding any alleged prohibited activity or disclosure of information.

Protected Communications Regarding Federal Programs

District employees will not be discharged, demoted, or otherwise discriminated against as a reprisal for disclosing information that the employee reasonably believes is evidence of gross mismanagement of a federal contract or grant, a gross waste of federal funds, an abuse of authority relating to a federal contract or grant, a substantial and specific danger to public health or safety, or a violation of law, rule, or regulation related to a federal contract (including the competition for or negotiation of a contract) or grant, to:

1. A member of Congress or a representative of a committee of Congress;
2. An inspector general;
3. The Government Accountability Office;
4. A federal employee responsible for contract or grant oversight or management at the relevant agency;
5. An authorized official of the Department of Justice or other law enforcement agency;
6. A court or grand jury; or
7. A management official or other employee of the contractor, subcontractor, grantee, subgrantee, or personal services contractor who has the responsibility to investigate, discover, or address misconduct.

Employees who believe that they have been subjected to a prohibited reprisal may submit a complaint to the inspector general of the federal executive agency involved.

Requests for Information and Testimony

In general, and in accordance with law, the district will comply with legislative requests for information as well as any requests for information by a court or other legislative body. Likewise, the district will cooperate in situations where a court or legislative body seeks district employee testimony regarding any alleged prohibited activity.

District employees who receive a legislative request for information are required to inform district administrators or supervisors. District employees are also required to provide district administrators or supervisors information regarding the substance of any testimony the district employee makes to legislators on behalf of the district.

Leaving Work Areas

District employees are required to follow all applicable rules and supervisor instructions regarding attendance. A district employee may not leave assigned work areas during normal work hours to discuss district operations or to make protected disclosures under this policy, particularly in situations where students would be left unsupervised, unless the employee:

1. Is reporting suspected child abuse or neglect;
2. Is asked by a legislator or legislative committee to appear before a legislative committee;
3. Is otherwise entitled by law or as part of his or her their duties to leave the assigned work area; or
4. Has requested and received permission from an administrator or supervisor to be relieved of his or her their

job duties for the purposes²² of reporting misconduct to the appropriate district authority. Such requests will be granted as soon as practical given the nature of the employee's job duties.

Unprotected Communications

Regardless of any protections afforded in this policy, a district employee may be disciplined for communicating information if the employee knew the information was false; if the information was disclosed in violation of the Missouri Sunshine Law or any other law; or if the disclosure was related to the employee's own violations, mismanagement, gross waste of funds, abuse of authority,²³ or endangerment of public health or safety.

Policy IGBCA: PROGRAMS FOR HOMELESS STUDENTS

Status: DRAFT

Original Adopted Date: 03/07/1994 | Last Revised Date: 06/20/2024

25A UPDATE EXPLANATION

The Department of Elementary and Secondary Education (DESE) has issued "Homeless Dispute Resolution Regarding the Education of Homeless Children and Youth Dispute Resolution (722(g)(1)(C) of the McKinney-Vento Homeless Assistance Act)" as the process for resolving disputes concerning eligibility, school selection, or school enrollment for homeless students or youth. The document is posted at dese.mo.gov/media/pdf/homeless-dispute-resolution-2024.

MSBA has updated this policy by shortening the section on disputes that now refers explicitly to the DESE document for the sake of compliance reviews and to guide the district's homeless liaison.

The board of education recognizes that homeless students are particularly vulnerable and need special assistance to access and benefit from the education environment. Therefore, the district, in accordance with state and federal law and the Missouri state plan for education of the homeless, will give special attention to ensure that homeless students in the district are promptly identified and have access to a free and appropriate public education and related support services.

Eligibility for Services

Homeless students are individuals who lack a fixed, regular, and adequate nighttime residence and include the following:

1. Children and youths who are sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; are living in motels, hotels, trailer parks, or camping grounds due to the lack of alternative adequate accommodations; are living in emergency or transitional shelters; or are abandoned in hospitals.
2. Children and youths who have a primary nighttime residence that is a public or private place not designated for or ordinarily used as a regular sleeping accommodation for human beings.
3. Children and youths who are living in cars, parks, public spaces, abandoned buildings, substandard housing, bus or train stations, or similar settings.
4. Migratory children who meet one of the above-described circumstances.

District Liaison for Homeless Students

The board designates the following individual to act as the district's liaison for homeless students (homeless liaison):

Barbara Medina, Federal Programs Director
Mountain View-Birch Tree R-III
502 N. Elm St.
Mountain View, MO 65548-8472
Phone: 417-934-5408 / Fax: 417-934-5404

The homeless liaison shall designate and train another district employee to serve as the homeless liaison in the absence of the homeless liaison.

School of Origin

For the purposes of this policy, "school of origin" is defined as the school that the student attended when permanently housed or the school in which the student was last enrolled, including a public preschool. When the student completes the final grade level served by the school of origin, the term shall then include the designated receiving school at the next grade level for all feeder schools.

Enrollment

The selected school shall immediately enroll the homeless student even if the student is unable to produce records

normally required for enrollment, such as previous academic records, immunization or other health records, proof of residency, or other documentation, and even if the student has missed any application or enrollment deadlines during any period of homelessness. Students will be awarded appropriate credit for full or partial coursework in accordance with board policy. Outstanding fines, fees, or absences shall not present a barrier to enrollment of the student. However, the district may require a parent/guardian of a homeless student to submit contact information.

Placement

The district will consider the best interest of the homeless student, with parental involvement, in determining whether the student should be enrolled in the school of origin or the school that nonhomeless students who live in the attendance area in which the homeless student is actually living are eligible to attend. In determining the best interest of the student, the district will:

1. Presume that keeping the student in the school of origin is in the student's best interest except when doing so is contrary to the request of the student's parents/guardians or the student if unaccompanied by a parent/guardian.
2. Consider student-centered factors related to the student's best interest, including factors related to the impact of mobility on achievement, education, health, and safety of homeless students, giving priority to the request of the homeless student's parents/guardians or the unaccompanied youth.

The choice regarding placement shall be made regardless of whether the homeless student lives with a parent/guardian or has been temporarily placed elsewhere. If the student is unaccompanied, the homeless liaison shall assist the student in placement or enrollment decisions, give priority to the views of the student, and provide the student with notice of the student's right to appeal the district's decision.

If the district determines that placement should be in the school of origin, the student will continue to be educated in the school of origin for the duration of the homelessness when the student's family becomes homeless between academic years or during an academic year, and for the remainder of the academic year even if the student becomes permanently housed during the academic year.

If the district determines that it is not in the best interest of the student to attend either the school of origin or the school requested by the parents/guardians or unaccompanied youth, the district shall provide a written explanation of the reasons for its determination. The explanation shall be given in a manner and form understandable to the parents/guardians or unaccompanied youth and shall include information regarding the right to appeal the district's determination.

The written explanation will include:

1. A description of the action proposed or refused by the district;
2. An explanation of why the action was proposed or refused;
3. A description of any other options the district considered;
4. The reasons other options were rejected;
5. A description of any other relevant factors to the district's decision and information related to the eligibility or best interest determination, including the facts and evidence relied upon and their sources;
6. Appropriate timelines to ensure any relevant deadlines are not missed; and
7. Contact information for the local liaison and the state coordinator for homeless students (state coordinator) and a brief description of their respective roles.

Services

Each homeless student shall be provided services comparable to the services offered to other students in the district including, but not limited to, transportation services; education services for which the student meets the eligibility criteria, such as education programs for disadvantaged students, students with disabilities, and gifted students; programs in career and technical education; school nutrition programs; preschool programs; before- and after-school care programs; and programs for English learners. Homeless students will not be segregated in a separate school or

program within a school based on the students' status as homeless.

The district will coordinate services for homeless students with local social service agencies and other agencies or entities providing services to homeless students and their families, including services and programs funded under the Runaway and Homeless Youth Act. The district will also coordinate transportation, transfer of school records, and other activities with other school districts.

Unaccompanied Youths

An unaccompanied youth is a student who is not in the physical custody of a parent or legal guardian. The liaison will work with unaccompanied youths on issues unique to their situations, such as informing them of their status as independent students under laws applicable to higher education and informing them that they may obtain assistance from the homeless liaison to receive verification of this status for the purposes of applying for federal student aid.

The homeless liaison, a school counselor, or a school social worker will verify, when applicable, that a student is an unaccompanied youth as defined in federal law.

Transportation

If the homeless student's school of origin, including a public preschool, and temporary housing are located in the district, the district will provide transportation to and from the school of origin at the request of the parents/guardians or homeless liaison, provided it is in the best interest of the student.

If the homeless student's school of origin and temporary housing are located in two different school districts, the districts may agree on a method to apportion the responsibility and costs for providing transportation to the school of origin. If no agreement is reached, the districts will equally share the responsibility and costs for transporting the student. If a homeless student becomes permanently housed in the middle of the school year, the district will continue to provide transportation to the school of origin for the remainder of the school year.

Transportation to the school of origin shall be provided even if a homeless preschooler who is enrolled in a public preschool moves to another district that does not provide a widely available or universal preschool.

Records

When a homeless student enrolls in the district or a district school, the district will immediately contact the school the homeless student last attended in order to obtain academic or other relevant records.

Any records ordinarily kept by the school for each homeless student (including immunization or other health records, academic records, birth certificates, guardianship records, and evaluations for special services or programs) shall be maintained so that the district is equipped to provide the student with appropriate services, make necessary referrals, and transfer records in a timely fashion when a homeless student enters a new school district. Copies of records shall be made available upon request to students or parents/guardians in accordance with the Family Educational Rights and Privacy Act (FERPA).

Information about a homeless student's living situation shall be treated as a student education record and shall not be deemed to be directory information under FERPA.

Homeless Liaison Responsibilities

The homeless liaison will attend all required professional development and other technical assistance activities as determined appropriate by the Department of Elementary and Secondary Education (DESE). The district shall inform school personnel, service providers, and advocates working with homeless families of the duties of the homeless liaison. The homeless liaison will ensure that:

1. Homeless students, including homeless preschool-age children and unaccompanied youths, are identified by school personnel through outreach and coordination activities with other entities and agencies.
2. Homeless students, including unaccompanied youths, are enrolled in and have a full and equal opportunity to succeed in schools in the district.
3. Homeless families and students, including unaccompanied youths, have access to and receive education

services for which they are eligible, including Head Start and Early Head Start, early intervention services under the Individuals with Disabilities Education Act, and preschool programs administered by the district, as well as referrals to healthcare services, dental services, mental health and substance abuse services, housing services, and other appropriate services based on their assessed needs.

4. The parents/guardians of homeless students are informed of the educational and related opportunities available to their students and are provided with meaningful opportunities to participate in the education of their students.
5. Public notice of the educational rights of homeless students is disseminated in locations frequented by parents/guardians, youths, and unaccompanied youths, including schools, family shelters, public libraries, and soup kitchens, in a manner and form understandable to the parents/guardians and youths.
6. Enrollment disputes are mediated in accordance with law.
7. The parents/guardians of homeless students and unaccompanied youths are fully informed of all transportation services, including transportation to the school of origin, and are assisted in accessing transportation to the selected school.
8. Unaccompanied youths will be assisted in placement or enrollment decisions, their views will be considered, and they will be provided notice of the right to appeal.
9. School personnel providing services to homeless students and their parents/guardians receive professional development and other support.
10. Students who need to obtain immunizations or medical or immunization records will receive assistance.
11. The district collects and reports reliable, valid, and comprehensive data to DESE regarding homeless students.
12. All homeless high school students receive information and individualized counseling regarding college readiness, college selection, the application process, financial aid, and the availability of on-campus supports.
13. Every effort is made to enroll preschool-age homeless children in preschool if they are not already enrolled.

Disputes

Parents/Guardians or unaccompanied youths may appeal district decisions regarding eligibility, enrollment or placement. The district will make every effort to resolve complaints or disputes at the district level. The homeless liaison will provide the parents/guardians or unaccompanied youth a written explanation of any decision related to school selection or enrollment, including the right to appeal such decisions, and inform the parents/guardians or unaccompanied youth of the district's complaint resolution process when a question or complaint arises concerning the education of a homeless student.

1. If the parent/guardian or unaccompanied youth has a complaint regarding the education of a homeless student, the person must notify the homeless liaison. The homeless liaison serves as the intermediary between the homeless student and the school where the student is seeking enrollment. The homeless liaison shall provide a copy of or access to the district's policies addressing the education of homeless students and the district's complaint form to the parents/guardians or unaccompanied youth.
2. The parents/guardians or unaccompanied youth can file a complaint in writing with the homeless liaison. The homeless liaison will provide a written resolution of the dispute or a plan of action within five days of the date the complaint was received by the homeless liaison. The parties may mutually agree to an extension of time; however, every effort should be made to resolve the complaint in the shortest possible time.
3. If the dispute is not resolved by the homeless liaison, the parents/guardians or unaccompanied youth may file a written complaint with the superintendent or designee for review. The superintendent or designee will provide a written resolution or plan of action within five days of the date the complaint was received by the superintendent or designee. The parties may mutually agree to an extension of time; however, every effort should be made to resolve the complaint in the shortest amount of time.
4. If the dispute is not resolved at the superintendent level, the parents/guardians or unaccompanied youth may

file a written complaint with the board of education. The board will provide a written resolution of the dispute or a plan of action within 30 days of the date the complaint was received by the board. If the dispute is not resolved by the board in a manner satisfactory to the parents/guardians or unaccompanied youth, an appeal may be brought to DESE in accordance with the state dispute resolution process, which the homeless liaison will provide to the parents/guardians or unaccompanied youth.

While the dispute process is ongoing, the student in question must be enrolled and allowed to fully participate in school activities as well as receive transportation, if requested, to the school in which the parents/guardians or unaccompanied youth seeks enrollment. The district shall make translators, interpreters or other support services available without charge and in the appropriate language to parents/guardians and unaccompanied youths who are English learners, use a native language other than English or need additional supports due to a disability. The district will use the then-current DESE "Homeless Dispute Resolution Regarding the Education of Homeless Children and Youth Dispute Resolution (722(g)(1)(C) of the McKinney-Vento Homeless Assistance Act)" recommended complaint resolution process when a dispute arises regarding the education of a homeless child or youth.

The dispute resolution process is intended to represent each party's views for objective consideration so that disagreements can be resolved expeditiously and in keeping with the McKinney-Vento provisions. The district homeless liaison will handle disputes concerning eligibility, school selection, or enrollment in school for homeless children or youth. During the dispute, homeless children or youth must be enrolled and fully participating in school activities as well as receive transportation, if requested, to the school in which the parent/guardian or unaccompanied homeless youth seeks enrollment during the dispute. The district liaison will carry out the dispute resolution procedures as quickly as possible after receiving notice of a dispute. Every effort must be made to resolve the complaint or dispute at the district level before it is brought to DESE. It is the district's responsibility to inform the parent/guardian or unaccompanied homeless youth of the district's Complaint Resolution Procedure when a question arises concerning the education of a homeless child or youth.

Career Ladder Plan

2025-2026

Board Approved on _____

Vision: The Mountain View-Birch Tree School District is two communities working as one to develop caring and responsible citizens.



Mission: Our mission is to empower and inspire all students to be successful before and after graduation. We strive to improve the quality of life through rigor, relevance, and relationships.

**MOUNTAIN VIEW-BIRCH TREE R-III
SCHOOL DISTRICT**

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SECTION I

STANDARD AND PURPOSE

CAREER LADDER GRANT PROGRAM STANDARD

STAGE	DOLLARS	HOURS	MINIMUM # OF RESPONSIBILITIES
STAGE I	\$1500	50	1
STAGE II	\$3000	75	1
STAGE III	\$5000	100	1

*Payment is subject to state appropriations.

The minimum number of responsibilities or volunteer efforts and the minimum number of clock hours must be met for a teacher to be eligible under the Career Ladder Grant Program.

PURPOSE OF MOUNTAIN VIEW-BIRCH TREE R-III SCHOOL DISTRICT CAREER LADDER PLAN

The Mountain View-Birch Tree R-III School District is committed to providing a successful educational experience for all students. Educational excellence is dependent largely on the skill, talent and dedication of educators. The purpose of the Career Ladder Program is to enhance the educational experience of students by recognizing and rewarding productive, effective educators.

The Mountain View-Birch Tree R-III School District has developed a School Improvement Plan, a Curriculum Development Plan, a Professional Development Plan and participates in the Missouri School Improvement Program in order to facilitate and improve the educational experience for all students. All Career Ladder responsibilities will be academic in nature and shall directly and obviously relate to the improvement of programs and services for students as outlined in the Mountain View-Birch Tree R-III School Improvement Plan, Curriculum Development Plan, Professional Development Plan, the Missouri School Improvement Program or other instructional improvement plan in the Mountain View-Birch Tree R-III School District.

The teacher's Career Development Plan (CDP) will associate each Career Ladder responsibility or volunteer effort with either a designated plan or other instructional improvement.

SECTION II

SUPPLEMENTAL PAY

Career Ladder Stages can be adjusted and prorated after initial plan is submitted. The deadline for adjusting the plan is April 1, 2026:

- Stage 3: If you do not log 100 hours, but log at least 75 hours, you will be compensated for Stage 2. **You will not be compensated for any hours from 76-99.**
- Stage 2: If you do not log 75 hours, but log at least 50 hours, you will be compensated for Stage 1. **You will not be compensated for any hours from 51-74.**

If at least 50 hours are not logged at Stage 1, Career Ladder compensation will be forfeited.

*Payment for Career Ladder is subject to state appropriations.

The Mountain View-Birch Tree R-III School District shall assign qualified, participating teachers to the appropriate stage and award teachers supplemental pay in an amount to be specified annually and not to exceed

- \$1,500 for Stage I
- \$3,000 for Stage II
- \$5,000 for Stage III

This supplemental pay shall be in addition to the salary normally accorded the teacher by the district's salary schedule.

**Career Ladder hours should occur outside of the compensated hours and duties and be completed from August 1, 2025 through May 8, 2026
Payments will occur no later than June 30, 2026.**

Note:

Districts must update their MOSIS/Core Data Career Ladder salary entries no later than April 1, 2026 for any teachers who are not on track to meet their Career Ladder plan by May 31, 2026. Changes in participating staff after approval of the application is allowed provided it does not exceed the maximum allocation amount.

*Payment for Career Ladder is subject to state appropriations.

SECTION III

STAGES

QUALIFICATIONS

ELIGIBLE STAFF

FULL TIME EDUCATORS REPORTED UNDER A 40,50,60,70, OR 90 CODE IN
MOSIS/CORE DATA

Any member of the Armed Forces of the United States or their spouse who has
teaching experience in another state and has transferred to Missouri. (Must meet all
other qualifications)

CERTIFIED TEACHERS
LIBRARIANS
SCHOOL COUNSELORS
SLP

QUALIFICATIONS AND COMPENSATION

STAGE 1

50 clock hours

1. Completed two (2) years teaching experience in Missouri public schools.
2. Completed the required beginning teacher assistance program and participated in two (2) years of mentoring (section 168.400.4 RSMo),
3. Performed at an acceptable level or above on all criteria on the most recent final evaluation instrument of the performance-based teacher evaluation process. The local evaluation process must be fully aligned to the Essential Principles of Effective Evaluation (5 CSR 20-400.375).
4. Be serving on not less than a regular length full time contract.
5. Appropriate certification in the subject area for each teacher.
6. Developed a Career Development Plan (CDP) that contains responsibilities or volunteer efforts that the educator will assume in order to receive his/her Career Ladder supplemental pay. The educator will complete one or more responsibilities or volunteer efforts by May 16, 2025. The district shall ensure that a minimum of fifty (50) clock hours are completed for Stage I. This requirement should coincide with the standard* and be commensurate and adjustable to the compensation offered for Stage I. The educator shall relate each responsibility to an identified plan or other instructional improvement.

QUALIFICATIONS AND COMPENSATION

STAGE 2

75 clock hours

1. Completed three (3) years teaching experience in Missouri public schools.
2. Completed the required beginning teacher assistance program and participated in two (2) years of mentoring (section 168.400.4 RSMo),
3. Performed at an acceptable level or above on all criteria on the most recent final evaluation instrument of the performance-based teacher evaluation process. The local evaluation process must be fully aligned to the Essential Principles of Effective Evaluation (5 CSR 20-400.375).
4. Be serving on not less than a regular length full time contract.
5. Appropriate certification in the subject area for each teacher.
6. Developed a Career Development Plan (CDP) that contains responsibilities or volunteer efforts that the educator will assume in order to receive his/her Career Ladder supplemental pay. The educator will complete one or more responsibilities or volunteer efforts by May 16, 2025. The district shall ensure that a minimum of seventy-five (75) clock hours are completed for Stage II. This requirement should coincide with the standard* and be commensurate and adjustable to the compensation offered for Stage II. The educator shall relate each responsibility to an identified plan or other instructional improvement.

QUALIFICATIONS AND COMPENSATION

STAGE 3

100 clock hours

1. Completed five (5) years teaching experience in Missouri public schools.
2. Completed the required beginning teacher assistance program and participated in two (2) years of mentoring (section 168.400.4 RSMo),
3. Performed at an acceptable level or above on all criteria on the most recent final evaluation instrument of the performance-based teacher evaluation process. The local evaluation process must be fully aligned to the Essential Principles of Effective Evaluation (5 CSR 20-400.375).
4. Be serving on not less than a regular length full time contract.
5. Appropriate certification in the subject area for each teacher.
6. Developed a Career Development Plan (CDP) that contains responsibilities or volunteer efforts that the educator will assume in order to receive his/her Career Ladder supplemental pay. The educator will complete one or more responsibilities or volunteer efforts by May 16, 2025. The district shall ensure that a minimum of one hundred (100) clock hours are completed for Stage III. This requirement should coincide with the standard* and be commensurate and adjustable to the compensation offered for Stage III. The educator shall relate each responsibility to an identified plan or other instructional improvement.

SECTION IV

RESPONSIBILITIES OR VOLUNTARY EFFORTS

RESPONSIBILITIES OR VOLUNTARY EFFORTS

ALL RESPONSIBILITIES OR VOLUNTARY EFFORTS MUST BE ACADEMIC IN NATURE

APPROVED

- Serving as a mentor or cooperating teacher for new teachers for which the teacher doesn't already receive additional compensation. (1st and 2nd year teachers, and teachers in new positions)
- Providing high quality tutoring or additional learning opportunities (includes make-up hours and homebound hours) for students
- Serving as a supervisor or organizer of any extracurricular activity for which the teacher does not already receive additional compensation.
- Assisting student with postsecondary education preparation including, but not limited to teaching an ACT or SAT preparation course or assisting students with completing college or career school admission or financial assistance applications
- Receiving additional teacher training, assigned by building principal or Superintendent, or coursework (1 credit hour=15 CL hours). Courses in administration are not eligible.
- Other (the responsibility or voluntary effort should directly and obviously relate to improved programs and services for students as outlined in the CSIP Plan, Curriculum Development Plan, PD Plan, MSIP, or instructional improvement and is an additional responsibility or voluntary effort extending beyond or in addition to those duties that require a teaching certificate)

NOT APPROVED BY DESE

- Painting classrooms or other school beautification projects
- Community activities that do not include students
- Community activities that include students but are not directly and obviously related to instruction (This includes community athletic events)
- Taking tickets, time keeping, score keeping, attending school functions
- Any fund raiser or concessions stand activities (PTO fundraisers, book orders, ball tournaments, etc.)
- Attending Board of Education meetings (unless attending to make a report for an approved committee)
- Any activity that is part of the educator's regular contracted day
- Any activity for which the educator receives compensation regardless of the source of that compensation
- Any church-affiliated activity
- Any activity related to scouting or other non-academic activities
- Tutoring cannot include open gym, study hall, detention, and/or any activity for which a teacher receives a stipend
- Preparation for or participation in IEP meetings
- Writing lesson plans or instructional units that are part of a teacher's regular responsibilities
- Supervision of students on a bus
- Attending a workshop or conference
- Any activity for which a teacher received a stipend in the past (i.e. replacing a stipend-supported activity with Career Ladder hours)

MVBT Requirements

1. You must log a minimum number of individual or small group “**tutoring**” hours.
Elementary and Middle School - tutoring must be high quality, using iReady or other research based intervention. High School - tutoring must be high quality and focused on a core or elective class. There is no minimum or maximum number of students. (This requirement does not apply to fine arts, practical arts, health teacher, Back to School Committee, or coaches.):
 - a. Stage 1: 10
 - b. Stage 2: 15
 - c. Stage 3: 20
2. When logging additional learning opportunities, you can only log the number of hours you are with students. Additional learning opportunities must be pre-approved by your principal and connected with your building CSIP. Your building principal may limit the number of teachers participating in activities, based on the number of students involved. Additional learning opportunities must include:
 - a. Elementary and Middle School: must be high quality opportunities focused on ELA, math, science, social studies, music, or art.
 - b. High School - must be high quality opportunities focused on a core class or elective class
3. You cannot log building-level meetings. There are some district-level committees that will be formed in each building, such as CARE Team. You can log your CARE Team committee meetings, since they take place in all buildings and are considered district-wide. (You can sign up for committees at the beginning of the school year.):
 - a. PDC,
 - b. Calendar,
 - c. CSIP,
 - d. MTTS, (academic and behavior tiered systems of support)
 - e. Culture and Climate,
 - f. Parent Involvement,
 - g. Attendance,
 - h. Safety,
 - i. Career Ladder,
 - j. Data (ie., district assessments),
 - k. Mental Health and Wellness (CARE Team)
 - l. or any other committee created by the Superintendent or your building principal.
4. You cannot log time you spend at conferences unless you are presenting. You can log the time you present. You can only log time outside of the school day that you are engaged in the conference. If you are taking students to a conference to provide additional learning opportunities, the time you are actively providing learning opportunities for those students outside of the school day can be logged.
5. Complete hours to the whole, quarter, or half hour. Do not round up.

SECTION V

DISTRICT'S CAREER LADDER PLAN DEVELOPMENT

The Mountain View-Birch Tree R-III School District selected four administrators, one parent and one board member to serve on a working group that developed the Mountain View-Birch Tree's School District's DCLP. This working group gathered feedback on the draft of the DCLP and made appropriate revisions before it was presented to the local school board for approval.

SECTION VI

DISTRICT'S CAREER LADDER ASSESSMENT COMMITTEE

This committee consists of educators, administrators and patrons. This committee will annually assess the success of the DCLP. They will report to the board each year at the regular May board meeting regarding the benefits for school and students, and teacher interest and participation. In addition, the Mountain View-Birch Tree R-III School District will report data on their Career Ladder Grant Program to the Department of Elementary and Secondary Education upon request.

Information reported to the department upon request may include but not be limited to:

1. Total number of teachers participating at each stage
2. Total state contribution
3. Total local contribution
4. Total hours of teacher participation in approved categories
5. Overall annual retention rates of participating teachers.

SECTION VII

APPEALS PROCEDURES

Any Mountain View-Birch Tree R-III educator who is denied participation in the Career Ladder Program due to a determination from the performance-based evaluation process or a determination that they have not met the requirements for participation will have the option to appeal that determination. The appeal procedure shall include:

- An opportunity to have the decision reviewed by the superintendent of schools;
- An opportunity for the local board of education to review the superintendent's decision.
- Appeal procedures shall be implemented in a timely fashion. All decisions made with respect to a teacher's application to, and placement on, any stage of the career ladder shall be based on the qualifications for that stage as stated in the Mountain View-Birch Tree R-III School District Career Ladder Plan.

SECTION VIII

TEACHER MOBILITY

TEACHER MOBILITY FROM ONE PARTICIPATING DISTRICT TO ANOTHER WITHIN THE STATE

An educator entering the Mountain View-Birch Tree R-III School District may apply to participate on any Career Ladder stage for which he/she is qualified based on total years of experience in a Missouri public school.

CAREER LADDER DEVELOPMENT PLAN FOR TEACHERS (CLDP)

LINK: [Career Ladder Tutoring/Learning Opportunities Form](#)

LINK: [Career Ladder Development Plan](#)

MVBT District Timelines:

August 30, 2025	Submit CLDP
5th of each month	Send logs to your building CL Committee member.
April 1, 2026	Revise CLDP if needed
May 1-18, 2026	Submit final CLDP and final log to your building principal
June 6, 2026	Final approval of CLDP and logs
June 30, 2026	Receive payment no later than June 30, 2026

*Career Ladder Tutoring/Learning Opportunities forms must be turned in by the 5th of each month to your building's Career Ladder Committee Member.

AGREEMENT
BETWEEN THE
MOUNTAIN VIEW-BIRCH TREE R-III
AND THE
MISSOURI NATIONAL EDUCATION ASSOCIATION-SPRINGFELD-
Mountain View-Birch Tree Bus Drivers

JULY 1, 2025 – JUNE 30, 2028

This Agreement is entered into between the Mountain View-Birch Tree R-III School District (hereinafter the “District”) and the Missouri National Education Association-Springfield-Mountain View-Birch Tree Bus Drivers (hereinafter the MNEA MVBT Bus Drivers) this _____ day of April, 2025. The term of Agreement shall begin July 1, 2025 and shall end June 30, 2028.

ARTICLE I
DEFINITIONS

Section 1.1 “Bargaining Unit.” The defined group of employees identified in Section 2.1 of this Agreement represented by the MNEA MVBT Bus Drivers in negotiations for a collectively bargained agreement with the District.

Section 1.2 “MNEA MVBT-Bus Drivers.” Missouri National Education Association-Springfield-MVBT Bus Drivers, refers to the local affiliate of the Missouri National Education Association. The Missouri National Education Association-Springfield was elected by employees in the Bargaining Unit to represent the unit to negotiate a collectively bargained agreement with the District.

Section 1.3 “District.” The Mountain View-Birch Tree R-III, the Board of Education and its administration, collectively.

Section 1.4 “Board” or “Board of Education.” The representative body elected by the registered voters of the Mountain View-Birch Tree School District of Howell County to exercise general supervision over the schools of the District, and to ensure that the schools are maintained as provided by the state statutes, the rules and regulations of the Missouri State Board of Education and/or the Missouri Department of Elementary and Secondary Education, and the policies, rules and regulations of the District in a manner accountable to the electorate, and responsive to the educational needs and the imposed financial constraints of the District.

Section 1.5 “Parties.” The District and Missouri National Education Association-Springfield-Mountain View-Birch Tree Bus Drivers (MNEA MVBT Bus Drivers), collectively.

Section 1.6 “Proposal.” A submission requesting a change in a term or condition of employment for members of the Bargaining Unit or term of this Agreement, sufficiently limited in scope so as to include only a single, concise issue, presented by either party, for negotiation under the terms of this Agreement.

Section 1.7 “Member.” Any regular bus driver, substitute bus driver, including the Assistant Transportation Director.

Section 1.8 “Regular Assigned Routes.” The route which an assigned driver drives each school day morning and the route an assigned driver drives each school day afternoon during the regular school year calendar as adopted by the Board of Education.

ARTICLE II RECOGNITION

Section 2.1 Recognition. The District recognizes the Missouri National Education Association-Springfield, as the exclusive bargaining representative pursuant to Section 105.525, RSMo. of all regular bus drivers and substitute bus drivers (including the Assistant Transportation Director); excluding Transportation Director and all other employees.

The Missouri National Education Association-Springfield was certified as the exclusive bargaining representative of the above-described Bargaining Unit by the State Board of Mediation and the District’s Board of Education, following an election by those employees in the unit on the 28th day of February, 2006. (The Missouri National Education Association shall be hereinafter referred to as “MNEA MVBT Bus Drivers”.)

Section 2.2 Publication of the Agreement. Within 15 days of final approval of this Agreement by both Parties, this Agreement will be placed on the District’s website. The District will provide a hard copy of the Agreement to each member of the Bargaining Unit within 15 days of final approval of this Agreement by both Parties, and will be made available in print following an appropriate request.

ARTICLE III NEGOTIATION PROCEDURES

Section 3.1 Term of Agreement. This Agreement shall be in effect from July 1, 2025 or such later date as may be shown above, through June 30, 2028. All matters within the scope of bargaining have been negotiated and agreed upon. The terms and conditions set forth in this Agreement represent the full and complete understanding and commitment between the District

and the MNEA MVBT Bus Drivers. The Parties each voluntarily and unqualifiedly waive any rights which might otherwise exist under law to negotiate over any matter during the term of this Agreement, and each agrees that the other shall not be obligated to bargain collectively during the term of this Agreement with respect to any matter, even though each subject or matter may not have been within the knowledge or contemplation of either or both parties at the time they negotiated or signed the Agreement.

Section 3.2 Establishment of Ground Rules. Specific rules for the conduct of the negotiations consistent with policies and parameters established by the Board will be established by agreement of the Parties, if possible, by January 15th of the bargaining year.

Section 3.3. Reopeners. During the term of this Agreement, in each school year either party may negotiate:

(a) Article VI, Section 1, relating to salary schedules for members of the Bargaining Unit may be reopened for negotiations each school year pursuant to the procedures of this Agreement. In addition to consideration of operation of the salary schedule, modifications to the existing salary schedule will be considered.

(b) During the term of this Agreement, each school year, either party may negotiate any current Agreement language changes to provisions in Articles I through IV. In addition to Article VI, Section 1, regarding Salary Schedule, either party may make two proposals related to working conditions and/or compensation of the Members of the Bargaining Unit or the language of this Agreement.

Nothing shall compel either party to agree to reopen or renegotiate the Agreement except as provided for in this Agreement.

Section 3.4 Contract Ratification. Any tentative agreement reached will be reduced to writing and initialed by the agents of the respective negotiating teams.

All members of the Bargaining Unit shall be permitted a reasonable opportunity to vote on ratification of this Agreement.

MNEA MVBT Bus Drivers will notify the Board, via the Superintendent, in writing of the outcome of the vote.

If ratified by the Bargaining Unit, the Agreement will be submitted to the Board of Education for approval.

Section 3.5 Contractual Amendments. Nothing shall compel either party to re-open the Agreement except as provided in Section 3.3 of this Agreement unless a provision shall be deemed unlawful by a court of competent jurisdiction. Any section found to be unlawful by a court of competent jurisdiction shall be bargained. Bargaining on that section only shall commence within sixty (60) days of the determination that the section(s) is unlawful by a court order. Bargaining shall conform to the procedures outlined in this Agreement. The bargaining on

any amendments is limited to thirty (30) days and shall follow the process for bargaining outlined in this Agreement.

ARTICLE IV DISTRICT RIGHTS AND AUTHORITY

SECTION 4.1 Agreement Consistency with Board Policy. The MNEA MVBT Bus Drivers and the District agree to follow the terms of this Agreement to the extent the terms of this Agreement are consistent with the terms of the Board of Education policies and/or regulations and applicable law. In the event of a conflict or inconsistency in the terms of this Agreement and Board policies and/or regulations, this Agreement shall govern. In the event of a conflict or inconsistency in the terms of this Agreement and applicable law, applicable law shall govern. The Board of Education shall have the sole discretion to determine if the terms of this Agreement conflict with or are inconsistent with Board of Education policies or regulations or applicable law.

SECTION 4.2 District Authority Altered Only by Specific and Express Agreement. It is understood and agreed that the District possesses the right and authority to operate and direct the employees of the District in all respects including, but not limited to, all rights and authority exercised by the District prior to the execution of this Agreement except as expressly and specifically limited in this Agreement. The authority and powers of the District as prescribed by the statutes and the Constitution of the State of Missouri and the United States shall continue unaffected by this Agreement except as expressly limited by the provisions of this Agreement. These rights and authority include, but are not limited to, the following:

1. To determine the District's mission, objectives, policies and budget and to determine and set all standards of service offered to the public;
2. To maintain executive management and administrative control of the District and its properties and facilities and the activities of its employees as related to the conduct of District affairs;
3. To delegate authority through recognized administrative channels for the development and organization of the means and methods of instruction and the performance of professional duties according to current Board policy or as the same may from time to time be amended, and to introduce new or improved methods, equipment and facilities;

4. To establish, modify or eliminate programs, curricula and/or courses of instruction, including special programs and athletic, recreational and social events for students. To determine whether to provide or purchase goods and services and to determine the methods, means and number of personnel needed to carry out the District's mission, all as deemed necessary or advisable by the Board;
5. To hire, direct, and schedule all employees and to determine their qualifications;
6. To determine employee's conditions for employment or continued employment and subject to the provisions of existing law and the terms of this Agreement;
7. To discipline, dismiss, demote, evaluate, promote, transfer or lay off any employee;
8. To determine the academic calendar; and
9. To determine the duties, responsibilities, and assignments of those individuals in this bargaining unit.

SECTION 4.3 District Authority to Make Changes without Negotiations. MNEA MVBT Bus Drivers and the District agree that the District specifically reserves the right to unilaterally change past practices, Board of Education policy or regulations without negotiations with the MNEA MVBT Bus Drivers prior to any such changes unless the language of such policy or regulation is quoted in this Agreement with specific reference to the title of the policy or regulation.

ARTICLE V INDIVIDUAL AND UNION RIGHTS

Section 5.1. Membership. No present or future member of the Bargaining Unit shall be required to become a member of the Association. Neither shall any present or future Bargaining Unit employee be required, for any reason, to tender fees, dues or assessments to the Association. Employees may become a member of the Association if they choose.

Section 5.2. Use of Buildings. MNEA MVBT Bus Drivers shall have the same right to use District buildings in the same manner as any other employee group in the District subject to the reasonable regulations and/or policies of the Board governing use of such buildings.

Section 5.3. Bulletin Board. The MNEA MVBT Bus Drivers shall be granted space at the Bus Office, where Bargaining Unit employees are regularly assigned to work, for the placement of one (1) bulletin board to be purchased and installed at the MNEA MVBT Bus Driver's expense. The Association may use an existing bulletin board provided if it is in agreement with the District and the MNEA MVBT Bus Drivers. A disclaimer will be displayed on the bulletin

board notifying readers that the views expressed on the board are exclusively those of the union, and not necessarily reflective of those of the District.

Section 5.4. Use of District Mailboxes. All bus drivers will be assigned a mailbox for inter-District mail.

Section 5.5 Use of District Email and Computer. The District will provide each bus driver a school email address for the purpose of District-related communications. The District will provide a computer in the bus office for bus drivers to access their email accounts for school-related business.

Section 5.6 List of Bargaining Unit Employees. The MNEA MVBT Bus Drivers Association, as the exclusive representative of the Bargaining Unit, may request contact information for the current members of the Bargaining Unit. Upon reasonable request, no more than twice per school year, the District will provide the Union with the names, and email addresses for the members of the Bargaining Unit.

Section 5.7 Lot/Yard and Other Maintenance Requests. Work order forms are located in the bus office and may be submitted by drivers when maintenance issues are identified. Work orders should be turned into the Transportation Director. In the event that a work order has not been fulfilled, a driver should make contact with the Superintendent regarding the maintenance matter.

The District will make reasonable best efforts to ensure that bus cameras are in working order and will create a schedule for incremental upgrades to bus cameras, while prioritizing upgrades based on specific safety concerns identified by District administration. Drivers should complete a work order form when a Driver identifies a malfunctioning bus camera and turn the form into the Transportation Director.

Section 5.8 Bus Cleaning Supplies and Training. The District will provide cleaning supplies necessary for required bus cleaning and sanitization protocols. Requests for additional supplies may be submitted to the Transportation Director. The District will provide all drivers with training related to the handling of hazardous material pursuant to Board Policy EBAB. The District will provide all drivers with training related to universal precautions related to communicable diseases pursuant to Board Policy EBB and EBB-AP. The District will provide all drivers with training related to illness and injury response and prevention pursuant to Board Policy EBBA. The District will provide all drivers with personal protective equipment in accordance with recommendations from the Howell County Health Department regarding COVID-19.

Section 5.9 Student Ridership. Drivers will issue bus write ups by completing the bus write up form and sending the bus write up form, via email, to the student's building principal and to the transportation director. After review and investigation, the building principal will respond, within a reasonable period of time, to the driver and the transportation director with the discipline action determined and provide any other pertinent information that the driver and transportation director need to know regarding the matter. The District will notify a driver in the event that a student of

the District has been removed from a bus route and will include in the notification the duration of the removal. The District will notify a driver in the event that a student requires an assigned seat and the duration of the assignment. School administrators will notify a driver in the event that a student-rider has committed an act of school violence under the Safe Schools Act for which notification is required.

In the event that a driver experiences ongoing disciplinary or behavior issues with a student rider, the driver shall contact the Transportation Director to arrange a meeting with the student's building principal to collaborate regarding effective behavior management strategies, and the principal shall submit their recommendations in writing to the transportation director to provide to the driver. The strategies may include, in the District's discretion, the temporary presence of a District administrator or designee, on the driver's route in order to review and assist with behavior management strategy implementation by the driver.

If the strategy is implemented by the driver and the behavior continues and is determined by the driver to be a safety issue, the driver shall notify the building principal and District administration who will determine if the next level of consequence in the student code of conduct for transportation shall be implemented.

On at least a quarterly basis, the Superintendent will meet with all drivers and the transportation director to provide ongoing communication related to student ridership, student discipline, and general training and information pertaining to transportation of students of the District.

Section 5.10 Seniority and Route Vacancies. The District will create and maintain a seniority list for all drivers and make such list available upon request to the Transportation Director. Seniority shall be defined as an employee's length of continuous service from the most recent date of hire for a bus driver position by the Board of Education. When a regular, full time route vacancy occurs, the District shall post a notification of such vacancy for a minimum of five (5) business days in a designated location at the bus office prior to filling the position. Drivers who desire to be considered for the route vacancy shall provide written notification to the Transportation Director within five (5) business days from the date the notification was posted. Routes will be assigned by the Transportation Director taking the following factors into consideration, in no particular order of priority: seniority, the needs of the District; the applicant's work performance and evaluations; training, experience, and work experience; qualifications; and service to the District.

Section 5.11 Grievance Procedure. A grievance is an allegation by an individual employee that a collective bargaining agreement or a specific, written, Board-adopted policy or regulation has been violated or misinterpreted. A grievance does not include concerns regarding performance evaluations or remedial documents, nonrenewal of contracts, employee discipline, reduction in force or termination. Employees may file a grievance according to Board Policy GBM, "Staff Grievances."

Section 5.12 Rights of Representation. Members of the Bargaining Unit will have a right to the presence of a representative, if requested by the Member, for the sole purpose of note-taking

and providing support in understanding the nature of the meeting, when meeting with a District-level administrator regarding an issue that:

- a) Is disciplinary and will result in documentation in the employee's personnel file;
- b) Involves a grievance filed by the Member pursuant to Board Policy GBM;

"Representative" shall mean an MNEA staff member or designated member leader.

Such meetings will be scheduled so as to allow a reasonable amount of time for the unit Member to obtain appropriate representation, if such representation is requested, but at least 24 hours in advance, when practicable, unless both parties agree to an earlier meeting. The representative requirement does not apply when immediate action is required by the administration to protect the health/safety of employees and/or students, or when the meeting is for investigatory purposes other than which would be related to (a) or (b) above. Administrators or supervisors may exclude a representative if the representative fails to conduct themselves in a professional and appropriate manner.

Section 5.13 Rider Expectations. The role of the bus driver is to create and provide a safe method of travel for all students and staff on the bus. The relationship between drivers and passengers in the school district shall be one of cooperation, understanding, and mutual respect. In an effort to allow for the driver to maintain focus on, attention to, and control of the bus, all riders must adhere to bus rules and regulations. Bus rules and regulations will be posted at the front of the bus for all passengers to view. These rules will be reviewed annually by the transportation director. Bus rules will be included in the Student-Parent Handbook, the Activities Handbook, and attached to each trip request form completed by staff members. All students of the District will receive a review of the bus rules at the beginning of each school year. Discipline while on a bus trip is under the direction of the accompanying staff. It is the responsibility of the chaperone to ensure all students are following safety procedures and to correct any action that goes against the bus rules and regulations and jeopardizes the safety of all passengers.

Section 5.14 Bus Evacuation Drills. To ensure awareness and comprehension as a key ingredient to the learning process and in preparation for the state mandated bus evacuation drills, the transportation director will work with Members of the Bargaining Unit to develop age-appropriate educational materials for student riders that will be reviewed annually by riders.

Section 5.15 Training. Drivers shall be compensated for 17.5 hours of required training annually. The District will notify Members of the Bargaining Unit of available CPR training and the District will pay the cost for Members to attend one such training annually, should a Driver elect to attend such training voluntarily.

Section 5.16 Trips and Trip Cancellations. Members shall receive preference for trip assignments for all trips that do not interfere with a Driver's regularly scheduled route, with the exception of trips that are assigned to a coach or sponsor as part of the coach/sponsor's duties. If such a trip is cancelled four (4) hours or less prior to a trip beginning, Drivers will be offered priority for the next available trip not already assigned.

ARTICLE VI COMPENSATION

Section 6.1 Salary Schedule. The Salary Schedule is incorporated into this Agreement as Exhibit A. The Salary Schedule will be operated for the 2025-26 school year with the improvements listed therein.

Section 6.2 Attendance/Safety Incentive and Employment Referral Incentive.

A. Beginning July 1, 2022, for the term of this Agreement, Bus Drivers will be eligible for an Attendance and Safety incentive each school quarter. Bus Drivers who have one hundred percent attendance for all required work days in a school quarter and who have no safety violations during the school quarter will receive a two hundred dollar incentive payment on the payroll date immediately following the end of the applicable school quarter. Drivers who elect to utilize available leave provided pursuant to Board Policy GDBDA for bereavement purposes, in the event of the death of a spouse, child, grandchild, or parent, will not have those absences counted against the attendance requirement set forth herein so long as no more than two leave days are taken during the applicable quarter.

- a. "Safety violation" shall be defined as: Any moving or non-moving violation that results in a ticket; any collision; any incident, which after an investigation by the District, is determined to have placed a student, staff member, or member of the public at risk of injury or harm due to the Driver's actions.

B. Beginning July 1, 2022, for the term of this Agreement, drivers will be eligible for an Employment Referral Incentive. Any driver who refers an individual for employment as a bus driver will, upon the completion of the newly hired bus driver's 40th regularly scheduled work day, receive a \$200 payment, which will be applied to the next regular payroll. Newly hired drivers who have been referred by the current driver shall also receive a \$200 incentive upon the completion of their 40th regularly scheduled work day. This Employment Referral Incentive shall not apply if the individual referred for employment currently works for the District in a different employment position or if the individual referred for employment has worked for the District as a bus driver within the 365 days prior to the date of the referral.

Section 6.3 Meal Reimbursement. The District will reimburse meals for up to two (2) meals (not snacks) for day trips up to \$30.00 per diem and three (3) meals (not snacks) for an overnight trip up to \$50.00 per diem except when the meal is provided by the club, team, or conference/meeting.

ARTICLE VII GENERAL PROVISIONS

Section 7.1 Governed by Missouri Law. This Agreement shall be subject to and interpreted in accordance with the laws of the State of Missouri.

Section 7.2 Savings Clause. If any of the provisions of this Agreement are found or deemed by a court of competent jurisdiction to be invalid or unenforceable, they shall be severable from the remainder of this Agreement and shall not cause the invalidity or unenforceability of the remainder of this Agreement.

Section 7.3 Execution in Counterparts. This Agreement may be executed in two (2) or more counterparts and all counterparts so executed shall for all purposes constitute one agreement, binding upon all parties.

The Parties, by the signatures below, represent that this Agreement has been executed by their duly authorized representatives as of the Effective Date.

MISSOURI NATIONAL EDUCATION ASSOCIATION-SPRINGFIELD

BY: _____
President

BY: _____
Chairperson, Negotiating Committee

MOUNTAIN VIEW-BIRCH TREE R-III

BY: _____
President, Board of Education

ATTESTED BY: _____
Secretary, Board of Education

EXHIBIT A

BUS DRIVER SALARY SCHEDULE 2025-2026 School Year

Years of Service	Hourly Rate	3.5 Hr/Day Annual	3.75 Hr/Day Annual	4 Hr/Day Annual	4.25 Hr/Day Annual	Longevity Stipend (Annual)	17.5 Hrs of Training	Total Annual (3.5 Hr/Day)	Total Annual (3.75 Hr/Day)	Total Annual (4 Hr/Day)	Total Annual (4.25 Hr/Day)
0-3	\$36.00	\$14,105	\$15,173	\$16,120	\$17,128	\$0	\$453	\$14,566.00	\$15,587.50	\$16,575	\$17,583
4-6	\$38.75	\$14,512	\$15,548	\$16,585	\$17,622	\$100	\$488	\$15,060.00	\$16,116.50	\$17,153	\$18,190
7-9	\$41.50	\$15,084	\$16,130	\$17,205	\$18,280	\$150	\$488	\$15,680.00	\$16,765.31	\$17,841	\$18,918
10-12	\$44.25	\$15,481	\$16,566	\$17,670	\$18,774	\$200	\$488	\$16,160.00	\$17,294.38	\$18,389	\$19,473
13-15	\$47.00	\$15,883	\$17,002	\$18,135	\$19,268	\$300	\$512	\$16,880.00	\$17,813.44	\$18,947	\$20,080
16-18	\$49.75	\$16,411	\$17,583	\$18,755	\$19,927	\$500	\$529	\$17,440.00	\$18,612.19	\$19,784	\$20,957
19-21	\$52.50	\$16,863	\$18,164	\$19,375	\$20,586	\$700	\$547	\$18,200.00	\$19,410.94	\$20,622	\$21,833
22-24	\$55.25	\$17,284	\$18,655	\$19,685	\$20,915	\$900	\$559	\$18,680.00	\$19,910.31	\$21,141	\$22,371
25-27	\$58.00	\$17,760	\$19,235	\$20,305	\$21,574	\$1,100	\$573	\$18,440.00	\$20,709.06	\$21,978	\$23,247
28-30	\$60.75	\$18,309	\$19,817	\$20,925	\$22,233	\$1,300	\$591	\$20,200.00	\$21,507.81	\$22,816	\$24,123

VC-TECH	\$39.437
HRD-CAP/ISE-SAM	Hourly wage per driver hourly rate
*Route Certified Driver Master	\$1.25
*Coach/Sponsor Trip Pay	\$75 per trip
*Non-Certified Sub Pay	\$75 per day
*NIBET Employee Certified Staff	\$93.75 per day
*Trip Pay All Staff	\$75 per hour

*Must be currently employed as a certified staff member of NIBET School Dist.

Non - Certified for 25-26

Abbey, Chelsea
Adams, Lora
Alcorn, Kelly
Baker, Rhonda
Baker, Shawn
Blunk, James
Bryant, Christen
Busby, Robert
Castevens, Tammy
Cooper, Dylan
Cooper, Paula
Day, Tracy
Enloe, Shelly
Franklin, Kyra
Frost, Sandra
Gastineau, Braden
Goldsmith, Leroy
Grandstaff, Heather
Greenan, Andrea
Guffy, Myles
Guffy, Trudy
Haines, Charlotte
Hampton, Karen
Henry, Rhonda
Henry, Tressa
Holland, Christopher
Hradek, Russell
Ledgerwood, Matthew
Lee, Daniel
Maiser, Razel

Martin, Geraldine
Martin, Leonard
Matlack, Timothy
McClellan, C. Mashell
McGuire, Janine
Miller, Angela
Nicholson, Caitlyn
Orchard, James (Doug)
Rawson, Linda
Ray, Cynthia
Renshaw, Melissa
Rinear, Leon
Ripko, Alisha
Roberts, Tracey
Rutledge, Lynda
Siebert, Donald
Shaw, Elizabeth
Smith, Sarah
Smith, Shawnda
Smotherman, Kelli
Stark, Johnny
Tharp, Mason
Vandevort, Destiny
Wake, Debra
Wallace, Brook
Webb, Marsha
Wilhelm, Ira
Woolsey, William (Bill)
Yearwood, Joyce
Zimmerman, Shauna

Related to Baord Members

Cooper, Caitlyn
Frazier, Lucas
Thompson, Amanda
Tripp, Katrina
Wilbanks, Travis

April 2025 BOARD REPORT

ADMINISTRATOR: Renshaw

K-5 CURRENT ENROLLMENT: 165

Focusing on Leadership (CSIP Goal 1)

- *Acceleration for All*
- *High Road Leadership*

Focusing on Effective Teaching and Learning (CSIP Goal 2)

- LETRS Year 2
- Early Childhood LETRS
- BTAP

Focusing on Collaborative Climate and Culture (CSIP Goal 3)

- GOAT
- Fruity Friday
- Climate & Culture continue to do an amazing job fostering community!

Focusing on Alignment of Standards, Curriculum, and Assessment (CSIP Goal 4)

- Continuing MAP testlets/practice
- Monitoring pacing guides

Focusing on Equity and Access (CSIP Goal 5)

- *Sora & EPIC (Books)
- *LIFE360
- *Food backpacks
- *Care To Learn
- *Creating high expectations for all
- *Attendance competitions
- *Elementary sports

CALENDAR

- April Testing/Screening
- April PreK/K screening
- 17th Progress Reports

MVE APRIL BOARD REPORT

ADMINISTRATOR(S): Jester/Marriott

CURRENT ENROLLMENT: 432
March Attendance: 91.29%
YTD Attendance: 93.23%

Focusing on Leadership (CSIP Goal 1)

- Reading "The Anxious Generation" and "Ruthless Equity" (stop hiding behind demographics!)
- Attended the SCA principal meeting on March 26
- Working on an Elementary Handbook for 25/26
- Maintaining high expectations

Focusing on Effective Teaching and Learning (CSIP Goal 2)

- Planning for 25/26 school year.
- Making sure teachers will have everything they need for next school year
- Planning field trips/end of year activities

Focusing on Collaborative Climate and Culture (CSIP Goal 3)

- Para Appreciation Day
- Staff Egg Grams
- Secretary Day
- Librarian Day
- MAP/iReady Buddies
- Pot luck/Picnic day!

Focusing on Alignment of Standards, Curriculum, and Assessment (CSIP Goal 4)

- Item Analysis review to improve MAP performance
- MAP/iReady testing begins next week
- MAP Practice tests
- Planning to update pacing guides to make sure both buildings are aligned
- RSP screenings and finalizing

Focusing on Equity and Access (CSIP Goal 5)

- Continuing to hold high standards for all student behavior.
- Removing students who disrupt the instructional environment to Focus Room or principal office

April:

4/1-4/4- Book Fair
4/2- Para Day!
4/2-4/4- kindergarten screening
4/10- Board Meeting
4/11- Science Fair
4/15- 2nd grade parent night
4/23- Head Start visits Kindergarten
4/24- Art Show
4/24-4/25- Preschool screening

APRIL BOARD REPORT

ADMINISTRATORS: Tammy Heiney and Justin Johnson

CURRENT ENROLLMENT: 259

Attendance Year: 93.83%

March: 93.41%

Focusing on Leadership (CSIP Goal 1)

- The Leadership Team continues to meet weekly and discuss the many systems at LMS. We are evaluating them and making changes for next year.
- Some staff are continuing the book study over Ruby Payne's newly released book *Educating Students Experiencing Homelessness, Instability, and Disengagement*.
- Mrs. Heiney attended the monthly SCA administration meeting. It is always a great visit hearing what other middle schools are doing.
- Mrs. Thomlinson is presenting a session at an upcoming art conference. It is exciting to see members of our staff leading!

Focusing on Effective Teaching and Learning (CSIP Goal 2)

- Mrs. Heiney has met with first year teachers and mentors to finalize their required paperwork. The mentor program is extremely beneficial to our first and second year teachers.
- LMS students participated in the Howell County Spelling Bee for the first time. Although we didn't have any students move on, we are proud of those who participated. Several of our teachers volunteered.

Focusing on Equity and Access (CSIP Goal 5)

- Mrs. Davis, Mrs. Heiney, and Mr. Johnson are finalizing our master schedule for next year. We are excited to be adding JAG to our schedule. We have started identifying qualifying students for the program and know that it will be extremely beneficial.

Focusing on Alignment of Standards, Curriculum, and Assessment (CSIP Goal 4)

- Teachers will finalize the updates on their pacing guides.
- Mrs. Heiney and Mrs. Holden submitted the Comprehensive Literacy State Development grant. If LMS receives it, we will be able to provide professional development and resources focusing on literacy, especially writing.
- Testing, testing, and more testing! We are preparing. Some of our teachers are holding MAP practice nights. We will have our MAP Assembly on April 25.

Focusing on Collaborative Climate and Culture (CSIP Goal 3)

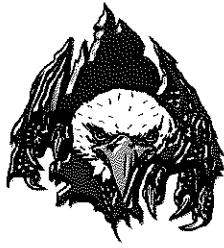
- LMS continues to focus on attendance. We held a March Madness attendance incentive which actually has carried over into April.
- 2025-2026 Planner Cover Competition: Students are developing covers next year's planners. Once submitted, we will vote on our "Better Together" cover.
- The G.O.A.T Award has been a hit! It is fun watching our staff recognize others.
- The Better Together Pancake Breakfast was a huge success. The LMS staff, parents, and students ate, played games, completed puzzles, and took a bag of crafts and activities home to do together.
- We held the "Are You Smarter Than a 7th Grader" parent night. Although a small number of parents attended, we had a great time!
- We celebrated our paraprofessionals and librarian this month! We have many more celebrations to come before the end of school!

CALENDAR

- MAP Parent Night: April 24
- STUCO Spring Dance: April 26
- 8th Grade Lock-In: May 9
- Career Day: May 12
- 8th Grade Field Trip: May 16
- 8th Grade Promotion: May 20
- Field Day: May 22

You are invited:





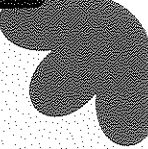
The Opportunity Wing

LMS

PURPOSE

The purpose of Opportunity Wing is to accommodate students' behavioral and academic needs, which cannot be adequately addressed in a traditional school environment. In addition, Opportunity Wing provides direct social, emotional, and behavior management instruction to students.

LEARNING



The students in the Opportunity Wing complete the core courses (ELA, Math, Social Studies, Science), and an elective. They also complete i-Ready diagnostic and lessons, along with their AR reading goal.

MISSION

The mission of the Opportunity Wing Program is to promote academic success, modify behavior, and facilitate employability and functional skills attainment. In addition, supporting career and character education development in an environment that differs from the traditional school setting and offers a more conducive setting for learning. Through ongoing instruction, guidance, and monitoring, students will be provided support with the goal of returning to a comprehensive school environment with the necessary abilities to function therein.

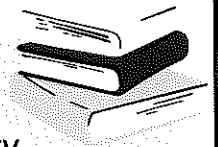
CURRENT STATS

Mrs. Mashell McClellan, paraprofessional, currently runs The Opportunity Wing. She has ten students. All of the students are 8th graders. Our number one goal is to help these students find success and start their high school career with a solid foundation.

NEXT YEAR

We currently have two students who will be in The Opportunity Wing next year. Through the systems we have in place at LMS, we foresee this number remaining low.

With JAG joining our schedule, our Opportunity Wing students will be able to have more support. We are excited about this.



LIBERTY HIGH SCHOOL

APRIL BOARD REPORT

ADMINISTRATOR(S): John Daniels and JC Hoagland

CURRENT ENROLLMENT: 328
Attendance: 94.56% (93.73% since Jan)

Focusing on Leadership (CSIP Goal 1)

- Continue to develop CTE departments in order to broaden our offerings and provide more opportunities for our students (Adding JAG, hopefully apprenticeships)
- Ongoing meeting w/ Department heads, counselors to discuss upcoming activities, EOC, Graduation, Schedules, etc.

Focusing on Effective Teaching and Learning (CSIP Goal 2)

- Evaluations completed
- Many students interested in votech next year. Morning/Afternoon sessions available in order to fit all interested students

Focusing on Collaborative Climate and Culture (CSIP Goal 3)

- Updating and working on CSIP
- Senior Service Day
- Senior Signing Day - invite parents
- We do small things throughout the year for our faculty to show appreciation whether it is breakfast, lunch, snacks, positive notes.

Focusing on Alignment of Standards, Curriculum, and Assessment (CSIP Goal 4)

- Preparing for EOC teachers to do practice tests with students
- Keeping curriculum up-to-date
- JAG - Richie Jester (LMS/LHS)
- Finalizing master schedule for next year so counselors can visit with students about options/possibilities/transcripts.

Focusing on Equity and Access (CSIP Goal 5)

- Ed Rising/Beta - National Qualifiers are raising money for their trip
- FFA Districts are this week to help decide who will be attending the State Convention
- Along with the master schedule we have to make sure it fits as many kids' schedule as possible.

CALENDAR

4/11	Interscholastic Competition @ MSU-WP Mother/Son Night from 6:00pm-8:00pm
4/13	Band Concert @ LHS - 3:00pm
4/16	Sr. Trip Parent Mtg @ 6:00pm
4/17	Adulting Day
4/23-25	FFA State Convention
4/28-5/3	Senior Trip
5/4	Choir Concert @ LMS - 3:00pm
5/6-9	EOC Testing
5/13	Sr. Service Day
5/14	Sr. Signing Day Baccalaureate @ 6:00pm
5/15	Senior Grad. Practice @ 8:00am Senior Awards Ceremony @ 6:00pm
5/16	Graduation @ 7:00pm
5/17	SYNC Night with incoming freshman/parents

SPECIAL EDUCATION

APRIL 2025 BOARD REPORT

ADMINISTRATOR: Barbara Medina

CURRENT ENROLLMENT: 226

- ECSE: 24
- K-12: 202
- MSB: 1
- Transfer In: 31
- Drops: 30
- Referrals: 79
- Testing Additional 6 Students
- Seniors Anticipated to Graduate: 17

SECTION 504:

- Current: 33
- Referrals: 10

Focusing on Leadership (CSIP Goal 1)

- DESE Special Education Finance Training 4/14/2025 Budget Application Revisions; Proportionate Share, Maintenance of Effort
- DESE Compliance Training: 4/10/2025 MTSS and Special Education
- Local Administrators Special Education Meeting (LASE) 4/11/2025
- DESE Compliance Training: 4/24/202 Data Reporting and End of Year Wrap-up

Focusing on Effective Teaching and Learning (CSIP Goal 2)

- Review Student 3rd Quarter Report Cards/IEP Progress Reports and Adjust Instruction to Ensure Student Success.
- Teacher Summative Evaluations Completed.

Focusing on Collaborative Climate and Culture (CSIP Goal 3)

- Bi-Monthly Special Education Staff Meetings in all Building
- Non Certified (Paraprofessional) Evaluations: Strengths and What Great Things you have accomplished this year!

Focusing on Alignment of Standards, Curriculum, and Assessment (CSIP Goal 4)

- MAP-A Spring Assessment In Progress
- MAP & EOC Spring Assessment In Progress
- Focus on Curriculum/IEP Progress throughout the year.

Focusing on Equity and Access (CSIP Goal 5)

- High Expectations for All Students
- The district assures all special education students have an equal opportunity to participate in program options, nonacademic and/or extracurricular activities and services offered by the district.
- Attendance Follow-ups (After 2 consecutive absences or 5 absences a quarter).

CALENDAR

- Title 1 Spring Meeting: April 23, 2025 5:00pm (Review: Student Achievement, Parent Surveys, Program Strength and Weakness, Review Plan, Suggestions & Recommendations for Program)



Liberty Eagle Athletics

502 N. Elm St.

Mountain View, MO 65548



J.C. Hoagland - Athletic Director

Kelli Smotherman - Administrative Assistant

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kasmotherman@liberty.mvbt.k12.mo.us

- New infield surface on the baseball field along with a new concession building
- Mr Chowning is looking into some upgrades to our lights because of a few danger areas
- Wood bat weekend was great, we had several big crowds and had several people in town for the weekend.
- Track meet coming up on Apr 21, 2025
- We have a few added soccer matches coming up and a home match on the 11th.
- We are in the process of scheduling some Summer shootouts for boys and girls basketball and hosting a big volleyball event as well.
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