

**REGULAR MEETING**  
May 14, 2026 at 6:30 PM - District Main Conference Room  
800 Devillen  
Royal Oak, Michigan 48073

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**AGENDA**

1. OPENING / CALL TO ORDER

2. PLEDGE OF ALLEGIANCE

3. STANDING APPROVAL ITEMS

3.1. Acceptance of Agenda

3.2. Approval of Minutes

2

**BOARD OF EDUCATION**  
**SPECIAL MEETING — OAKLAND COUNTY ENHANCEMENT MILLAGE WORKSHOP**

April 7, 2026, at 6:30 PM - District Main Conference Room  
800 Devillen  
Royal Oak, Michigan 48073

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**MINUTES**

**PRESENT:** President Tim Ciechorski; Vice President Erika Alexander; Secretary Maryanne VanHaitsma; Treasurer Michelle Cook; Trustee Deb Anderson; and Trustee Lauren Jasinski

**ALSO PRESENT:** Director of Finance & Operations Kathy Abela; Deputy Superintendent of Curriculum & Instruction Joe Youanes; Executive Assistant to the Superintendent & Board of Education Jennifer Perkins; Director of Communications Samantha Jones; and Communications Specialist Tyler Schmidt

**ABSENT:** Trustee Matt Wickey

1. OPENING / CALL TO ORDER Mr. Ciechorski called the meeting to order at 6:50 p.m.

2. PUBLIC COMMENT There were none.

3. DISCUSSION AND PRESENTATION ON MILLAGE PROPOSAL

Dr. Youanes delivered a presentation outlining the Oakland County Millage Proposal, which included statistics regarding funding and ideas for use of funds, including transportation and staff retention.

Discussion was conducted by all participants, including various ideas for fund usage.

4. ADJOURNMENT (approval by consensus)

President Ciechorski called for adjournment of the meeting at 8:40 p.m. Approved by consensus.

Respectfully submitted,

Maryanne VanHaitsma  
Secretary, Board of Education

**BOARD OF EDUCATION  
REGULAR MEETING**

April 9, 2026, at 6:30 PM - District Main Conference Room  
800 Devillen  
Royal Oak, Michigan 48073

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**MINUTES**

**PRESENT:** President Tim Ciechorski; Vice President Erika Alexander; Secretary Maryanne VanHaitsma; Treasurer Michelle Cook; Trustee Deb Anderson; Trustee Matt Wickey; and Student Representatives Leilani Hamilton and Grace Hatton.

**ALSO PRESENT:** Superintendent John Tafelski; Deputy Superintendent of Curriculum & Instruction Joe Youanes; Executive Director of Finance & Operations Kathy Abela; Deputy Superintendent of Curriculum & Instruction Joe Youanes; Executive Director of Staff & Students Services Patrick Wolynski; Executive Assistant to the Superintendent & Board of Education Jennifer Perkins.

**ABSENT:** Trustee Lauren Jasinski

1. OPENING / CALL TO ORDER Mr. Ciechorski called the meeting to order at 6:33 p.m.

2. PLEDGE OF ALLEGIANCE The pledge was recited.

3. STANDING APPROVAL ITEMS

3.1. Acceptance of Agenda

President Ciechorski called for any additions or deletions. Seeing no objections the agenda was approved by consensus.

3.2. Approval of Minutes

Moved by: Mrs. Alexander                      Seconded by: Mrs. VanHaitsma

Resolved that the Royal Oak Schools Board of Education approves the following minutes:

March 5, 2026, Special Meeting (F&F)

March 12, 2026, Regular Meeting

6 in favor/0 opposed/0 abstentions. The motion passed.

4. PROCLAMATIONS

#### 4.1. Proclamation: National Arab American Heritage Month

Moved by: Mr. Wickey

Seconded by: Mrs. Anderson

WHEREAS, Royal Oak Schools recognizes and celebrates the rich cultural heritage, achievements, and contributions of Arab Americans; and

WHEREAS, April is designated as National Arab American Heritage Month, a time to honor the diverse traditions, history, and accomplishments of Arab Americans; and

WHEREAS, Arab Americans have made significant contributions to our nation and community in various fields, including education, arts, sciences, and business; and

WHEREAS, Royal Oak Schools is committed to fostering an inclusive and welcoming environment for all students, recognizing and valuing the diversity of our student population; and

NOW, THEREFORE, BE IT RESOLVED, that the Royal Oak School Board of Education hereby proclaims April 2026 as National Arab American Heritage Month.

6 in favor/0 opposed/0 abstentions. The motion passed.

#### 4.2. Proclamation: Autism Acceptance Month

Moved by: Mrs. Cook

Seconded by: Mrs. Alexander

WHEREAS: Autism is a developmental disability that is usually evident before the age of three and can lead to differences in how people interact with others, communicate, demonstrate flexibility in thoughts, and actions, and learn; and

WHEREAS: Autism is considered a spectrum as it presents differently in everyone, and individuals with autism may have particular strengths in one area and particular barriers or high support needs in another; and

WHEREAS: Autism occurs across all socioeconomic, ethnic, cultural, and geographic groups, and according to 2025 data from the Centers for Disease Control and Prevention, autism spectrum disorder impacts as many as one in 31 kids in the United States; and

WHEREAS: Schools, educators, and families across Michigan strive to provide services and supports to ensure that all students with autism can fully participate and thrive in their education and beyond; and

WHEREAS: Educators, families, and community organizations recognize the essential need for collaboration in expanding awareness and improving supports and services for students with autism; and

WHEREAS: This April, the Royal Oak Schools Board of Education joins students, families, and school district staff in celebrating the unique and positive identity of students with autism.

6 in favor/0 opposed/0 abstentions. The motion passed.

5. PUBLIC COMMENT FOR ITEMS ON THE AGENDA

Ben Dupee spoke about policies regarding non-discrimination (item 9.1.1).

6. RECOGNITIONS / PRESENTATIONS / REPORTS

6.1. Special Bond Presentation

Dr. Tafelski showed a PowerPoint presentation outlining statistics and plans for the August 4, 2026, bond proposal.

6.2. Presentation of the 2025–26 Teachers of the Year and Support Person of the Year

Pat Wolynski opened the presentation. Don Loomis presented Alec Snyder, Kristin Meldrum presented Shannon Bowman, Tim Boyer presented Miranda McArthur, Danielle Truesdell presented Mary Beth Nagy, and Jason Taylor presented Angela Hall.

6.3. Break for Photos

Photographs were taken of all honorees.

6.4. Diversity, Equity and Inclusion

Ashley Phillips provided an April DEI update which included the following:

RP & CR Training  
Student/Club Visits  
MDE Training  
Neurodiversity Support – ROPAC Reminder  
Neurodiversity Support – FCCN  
Summer Camp Access & Opportunities  
IFLC Family Odysseys  
Upcoming Events & Activities  
2026 Reading ROCKS Tour Recap

6.5. Student Representatives to the Board

Ms. Hamilton spoke about:

MStepTesting  
Third quarter ending  
Spring sports  
New athletic eligibility process

Ms. Hatton spoke about:

ROJAM date  
Spring sports  
Spring play – *Mall Madness*

7. COMMUNICATIONS

Mrs. VanHaitsma, BOE Secretary, reported the following communications:

Stacy Wojcikiewicz	Ashley Morel
Andrea Nevedal	Carrie Hribar
Laura Sayen	Karen Jones
Kelly Marcikic	Vickie Randel

8. \*CONSENT AGENDA (*Personnel / Instruction / Business*)

Consent Agenda items approved at this time.

8.1. \*Payment of Expenses

Resolved that the Royal Oak Schools Board of Education hereby approves expenditures as processed in the amount of \$7,775,261.34, for the period of March 1, 2026, through March 31, 2026.

8.2. \*Field Trip – Royal Oak High School students will travel to Atlanta, Georgia to compete in the DECA ICDC Competition

Resolved, that the Royal Oak Schools Board of Education approves the request from teacher Cheryl Turk and her three CTE students to attend the DECA competition in Atlanta, GA from April 24–29, 2026.

9. MATTERS FOR DISCUSSION / ACTION

Dr. Tafelski gave a brief overview of all policies on the agenda.

9.1. Superintendent Report

9.1.1. First Reading of Revised/Replaced and/or Recommended Policies on Nondiscrimination

Moved by: Mr. Wickey

Seconded by: Mrs. Cook

Resolved, that the Royal Oak Schools Board of Education approves a first reading of the policies being revised, replaced and/or recommended as presented.

6 in favor/0 opposed/0 abstentions. The motion passed.

9.1.2. First Reading of Revised/Replaced and/or Recommended Policies

Moved by: Mrs. Alexander

Seconded by: Mr. Wickey

Resolved, that the Royal Oak Schools Board of Education approves a first reading of the policies being revised, replaced and/or recommended as presented.

6 in favor/0 opposed/0 abstentions. The motion passed.

9.1.3. 2026 Bond Resolution

Moved by: Mrs. Cook

Seconded by: Mrs. VanHaitsma

WHEREAS, the School District is contemplating undertaking various capital improvements to facilities within the School District which include remodeling, equipping, re-equipping, furnishing, re-furnishing school buildings, athletic fields and other facilities; erecting and completing additions to school buildings and other facilities; acquiring and installing instructional technology infrastructure and equipment in school buildings and other facilities; and preparing, developing and improving sites at school buildings, athletic fields and other facilities (collectively the "Projects"); and

WHEREAS, the School District is of the opinion that in order to finance the Projects, a bonding proposition should be submitted to the electors as described in the School Improvement Bond Proposition attached hereto as Exhibit A (the "Bond Proposition"); and

WHEREAS, the School District desires to submit the Bond Proposition to the electors at an election to be held on August 4, 2026 (the "August Election Date"); and

WHEREAS, Michigan law requires that the School District certify the ballot language for any proposals to be voted on at a permitted election date to the School District's Election Coordinator (i.e. the Clerk of the County of Oakland) not later than 4:00 p.m., on the twelfth Tuesday before the election date; and

WHEREAS, the School District desires to approve and certify the above referenced Bond Proposition and to authorize the Superintendent or his designee to certify the Bond Proposition to the School District's Election Coordinator for the August Election Date.

NOW, THEREFORE, BE IT RESOLVED THAT:

1. The Bond Proposition attached hereto as Exhibit A, is hereby approved and certified to the School District Election Coordinator for submission to the School District's electors on the August Election Date. The Superintendent, or his designee, on behalf of the Secretary of the Board is hereby authorized and directed to file this Resolution and/or complete any such forms, certificates or documents as may be required by the School District Election Coordinator to evidence the foregoing certification and/or submission by no later than 4:00 p.m. on May 12, 2026.

2. The School District Election Coordinator is hereby authorized and directed to: (a) post and publish notice of last day of registration and notice of election for the August Election Date; and (b) have prepared and printed ballots for submitting the Bond Proposition at the August Election Date, which ballots shall be in the form appearing in Exhibit A or the Bond Proposition shall be stated as a proposal on the voting machines, which ballots may include other matters presented to the electorate on the same date.

3. All resolutions and parts of resolutions insofar as they conflict with the provisions of this Resolution are hereby rescinded.

6 in favor/0 opposed/0 abstentions. The motion passed.

#### 9.1.4. Updates and Remarks

Dr. Tafelski spoke about the following topics:  
Oakland County Enhancement Millage  
Care Solace Program availability for all

## 9.2. Curriculum & Instruction

Dr. Youanes spoke about the improvements and plans for the kindergarten program. He also introduced Stephen Melchor to give details on the Firewall Contract Award.

### 9.2.1. Firewall Contract Award

Moved by: Mr. Wickey

Seconded by: Mrs. Anderson

Resolved, that the Royal Oak Schools Board of Education authorizes the Superintendent to finalize the purchase of a new Firewall and installation from Delta Network Services LLC, in the amount of \$67,533.00 with 10% contingency to address any unforeseen conditions. Additionally, associated licensing costs from Oakland Schools in the amount of \$9,565.26.

6 in favor/0 opposed/0 abstentions. The motion passed.

## 9.3. Finance/Facilities and Bond

Mrs. Abela explained the pricing, materials, and processes for the following contracts.

### 9.3.1. Three-year contract awards

Moved by: Mrs. Alexander

Seconded by: Mrs. Cook

Resolved, that the Royal Oak Schools Board of Education authorizes the Superintendent to finalize and sign a contract with the following vendors per the unit pricing as noted in the attached bid tabulation sheets. The pricing and contracts are District-wide for 3 years.

MJ Chisholm construction for concrete  
Kimberly Fence for fencing  
Seven Brothers Painting for painting

6 in favor/0 opposed/0 abstentions. The motion passed.

### 9.3.2. Three-year Contract Award — Playground Mulch Jeff Synowiec discussed different types of mulch.

Moved by: Mrs. VanHaitsma

Seconded by: Mr. Wickey

Resolved that the Royal Oak Schools Board of Education authorizes the Superintendent to finalize and sign a contract with Superior Groundcover Inc, utilizing HVS CoPro+ Cooperative Pricing. The pricing and contract are District-wide for 3 years.

6 in favor/0 opposed/0 abstentions. The motion passed.

#### 9.3.3. ROMS Dectron Contract Award

Moved by: Mrs. Cook

Seconded by: Mr. Wickey

Resolved that the Royal Oak Schools Board of Education authorizes the Superintendent to finalize and sign a contract with Miller-Boldt, Inc., in the amount of \$58,642 for Royal Oak Middle School Pool Cooling Unit Partial Replacement, base bid #2. Additionally, 10% contingency to address any unforeseen conditions.

6 in favor/0 opposed/0 abstentions. The motion passed.

#### 9.3.4. Water Bottle Filler Contract Award

Moved by: Mr. Wickey

Seconded by: Mrs. Cook

Resolved that the Royal Oak Schools Board of Education authorizes the Superintendent to finalize and sign a contract with Service Pro, LLC., in the amount of \$78,280 for District-wide water bottle filler purchase and installation. Additionally, 10% contingency to address any unforeseen conditions.

6 in favor/0 opposed/0 abstentions. The motion passed.

#### 9.3.5. Northwood Chiller Compressor Contract Award

Moved by: Mrs. Anderson

Seconded by: Mrs. VanHaitsma

Resolved that the Royal Oak Schools Board of Education authorizes the Superintendent to finalize and sign a contract with Miller-Boldt, Inc., in the amount of \$37,200 for Northwood Elementary chiller compressor replacement. Additionally, 10% contingency to address any unforeseen conditions.

6 in favor/0 opposed/0 abstentions. The motion passed.

#### 9.4. Staff and Student Services

Mr. Wolynski gave an enrollment and staffing update and introduced John Grzywack to speak on his retirement.

##### 9.4.1. Personnel Changes

Moved by: Mrs. VanHaitsma

Seconded by: Mrs. Alexander

Resolved, the Royal Oak Schools Board of Education approves the regular personnel changes as presented in the board packet.

6 in favor/0 opposed/0 abstentions. The motion passed.

#### 10. PUBLIC COMMENT FOR ITEMS NOT ON THE AGENDA

Bryan Morel spoke about the Champions Program and his son's accident.

11. BOARD COMMENTS / LIAISON REPORT

Liaison Reports: Health & Wellness—Maryanne VanHaitsma

Topics covered were:

- Food service updates
- Narcan kits & training
- QR codes for reporting bathroom issues
- Bathroom accessibility
- Potential ROMS vape presentation
- Health programs
- Survey re: safety
- Grant opportunities

Board Comments:

Mrs. VanHaitsma spoke about the last student/BOE lunch of the year.

12. ADJOURN TO CLOSED SESSION

Adjourned at 9:20 p.m.

Moved by: Mr. Wickey

Seconded by: Mrs. Alexander

Resolved, that Royal Oak Schools Board of Education meet in closed session under section 8(h) of the Open Meetings Act, to consult with our attorney to consider information or records subject to the attorney-client privilege, as allowed in section 13(1)(g) of the Freedom of Information Act.

ACTION: Roll Call Vote

Mr. Wickey	Yes
Mrs. Anderson	Yes
Mrs. Cook	Yes
Mrs. VanHaitsma	Yes
Mrs. Alexander	Yes
Mr. Ciechorski	Yes
Motion Carried:	Unanimously

13. RECONVENE

The Board reconvened at 10:48 p.m.

14. ADJOURNMENT (approval by consensus)

President Ciechorski called for adjournment of the meeting at 10:49 p.m. Approved by consensus.

Respectfully submitted,

Maryanne VanHaitsma  
Secretary, Board of Education

#### 4. PROCLAMATIONS

4.1. Mental Health Awareness Month

4.2. National Foster Care Month

4.3. Jewish American Heritage Month

4.4. Asian American, Native Hawaiian and Pacific Islander Heritage Month

4.5. National Gun Violence Awareness Day

#### 5. PUBLIC COMMENT FOR ITEMS ON THE AGENDA

#### 6. RECOGNITIONS / PRESENTATIONS / REPORTS

6.1. Presentation of ROHS Art Students

**Presenter:** Alicia Duncan

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# May Board Meeting

## **CELEBRATING AWARD-WINNING ROYAL OAK HIGH SCHOOL STUDENT ARTISTS**

SE Regional Scholastic Art Awards

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29th Annual National K-12 Ceramic Exhibition

**Cheyenne Baker**, 11th grade

**SE Michigan Regional Scholastic Art Awards**

**Honorable Mention**



*Bracelet*

Charcoal drawing on tonal paper

**Brady Collins**, 12th grade

**SE Michigan Regional Scholastic Art Awards**

**SILVER KEY**



*Mixed Emotions*  
Digital photography

**Keira Foster**, 12th grade  
**SE Michigan Regional Scholastic Art Awards**

**Honorable Mention**



*Bubbles*  
Photography

**GOLD KEY**



*Pukeko*, 2025  
Stoneware, sculpey, wire, and acrylic paint

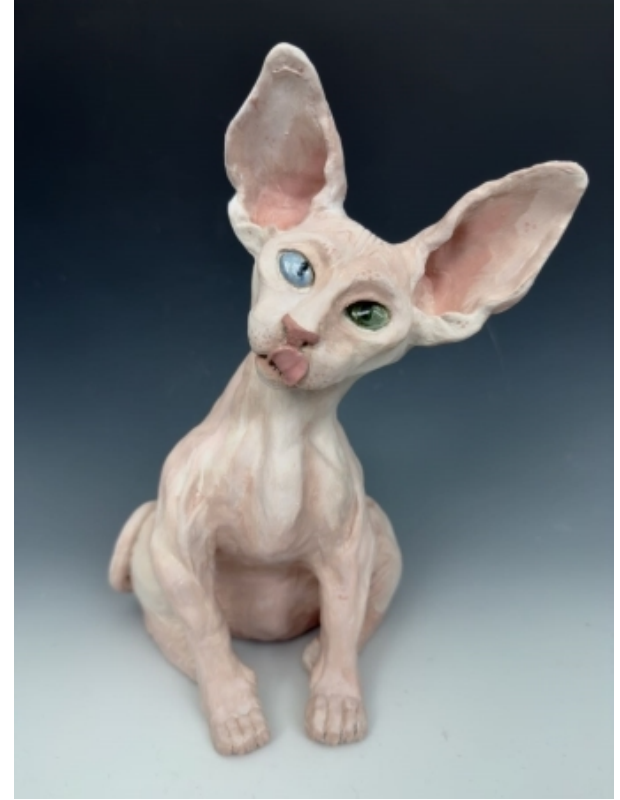
**Sylvia Heidtman**, 10th grade  
**SE Michigan Regional Scholastic Art Awards**

**SILVER KEY**



*Goddess of Death*, 2025  
Stoneware, oxide wash, acrylic paint

**SILVER KEY**



*Sphinx*, 2025  
Stoneware, underglaze, glaze, acrylic paint

**Eva Houston**, 12th grade

**SE Michigan Regional Scholastic Art Awards**

**GOLD KEY**



*Covered From the Rain*  
Digital drawing, painting, collage

**June Keeran**, 11th grade  
**SE Michigan Regional Scholastic Art Awards**

**GOLD KEY**



*Sea of Fabric*  
Mixed Media

**Henry Knoll**, 11th grade

**29th Annual National K-12 Ceramic Exhibition**

Artistic Achievement Award

Kansas City Art Institute Scholarship, \$25,000 annual (\$100,000), and Full Scholarship Summer Ceramic Intensive

\$500 Laguna Scholarship



Henry and his father with his scholarship award.



*A Balanced Ecosystem, 2026*  
Stoneware, underglaze, and glaze

**Henry Knoll**, 11th grade

**SE Michigan Regional Scholastic Art Awards**

**Honorable Mention**



*Circular Saw, 2025*  
Cardboard, glue

**GOLD KEY**



*Alligator, 2025*  
Stoneware, glaze

**Honorable Mention**



*EDC Tray, 2025*  
Stoneware, underglaze, glaze

**Mia Maccani**, 10th grade:  
**SE Michigan Regional Scholastic Art Awards**

**GOLD KEY**

**Honorable Mention**



*Tradition, 2025*



*Things that Stick*  
Mixed Media

**Drew Messing**, 10th grade

**29th Annual National K-12 Ceramic Exhibition**

- William D. Parry Memorial Scholarship, \$25,000 annual (\$100,000)
- Scholarship for New York State College at Alfred University
- \$50 Blick Artistic Achievement Award
- Regina Brown Teacher Development Award
- Teacher Award Honoring Daniel Rhodes

**SE Michigan Regional  
Scholastic Art Awards**

**Honorable Mention**



Drew with his scholarship award and his parents.



*Crocodile, 2026*  
Stoneware, underglaze, glaze

**Madison Millard**, 12th grade

**SE Michigan Regional Scholastic Art Awards**

**Honorable Mention**



**PORTFOLIO**

**Lizard Exploration**

**SILVER KEY**



*Chameleon, 2025*  
Stoneware, underglaze, oxide wash, glaze

**Madison Montgomery**, 10th grade  
**29th Annual National K-12 Ceramic Exhibition**

Sculpture sold for \$250.00



*Olli*, 2025

Stoneware, underglaze, glaze, acrylic paint

**Emma Viggiano**, 10th grade

**SE Michigan Regional Scholastic Art Awards**

**Honorable Mention**



*African Elephant*

Stoneware, underglaze, glaze, acrylic paint

**Aidan Wilson**, 11th grade  
**SE Michigan Regional Scholastic Art Awards**

**SILVER KEY**



*Violations, 2025*  
Cyanotype, coffee, pigments

**GOLD KEY**




*A Cardboard Cartwheel, 2025*  
Cardboard, glue

6.2. Presentation of Royal Oak High School Ice Skating Academy Members  
**Presenter:** Matt Wickey

6.3. Presentation of Adriana Alexander

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A photograph of a beach with gentle waves washing onto the sand. The text 'FISH FOR THE FUTURE' is overlaid in the center in a bold, white, sans-serif font with a slight drop shadow. The background shows the texture of the water and the smooth surface of the sand, with some dark rocks visible on the left side.

**FISH FOR THE FUTURE**

6.4. Recognition of Student Board Members

6.5. Recognition of Optimist Club Members

**Presenter:** Matt Wickey

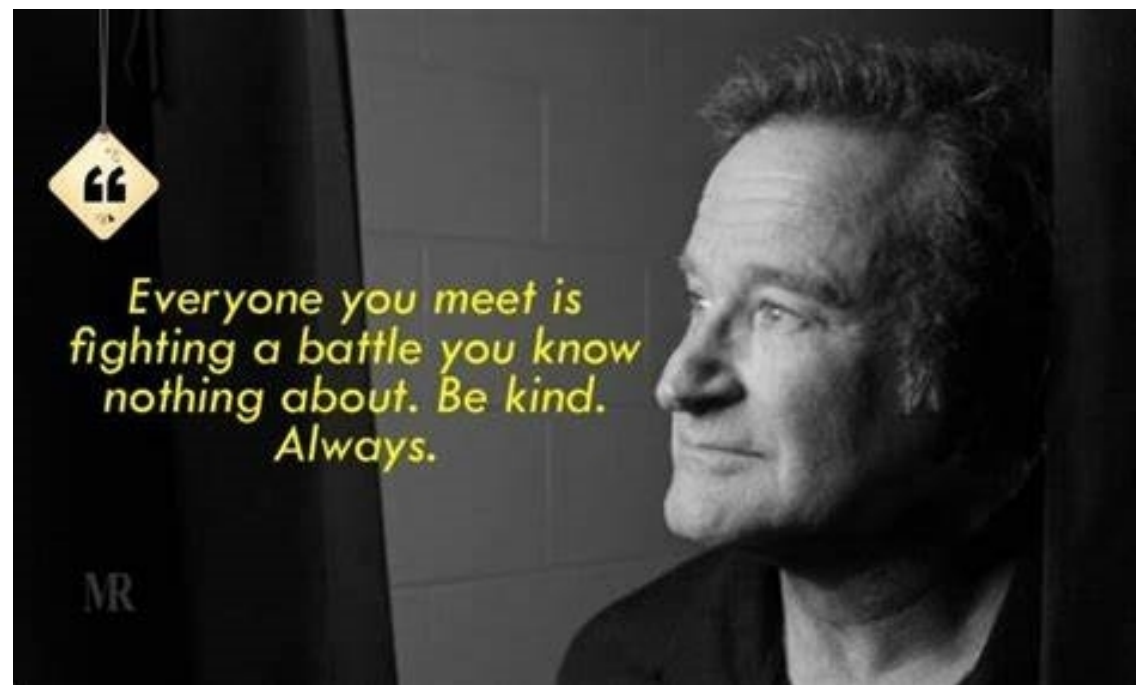
6.6. Presentation on Mental Health Awareness Month

**Presenter:** Thomas Harwood

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Sometimes we need someone to simply be there...Not to fix anything or do anything in particular, but just to let us feel we are supported and cared about.



“  
*Everyone you meet is fighting a battle you know nothing about. Be kind. Always.*”

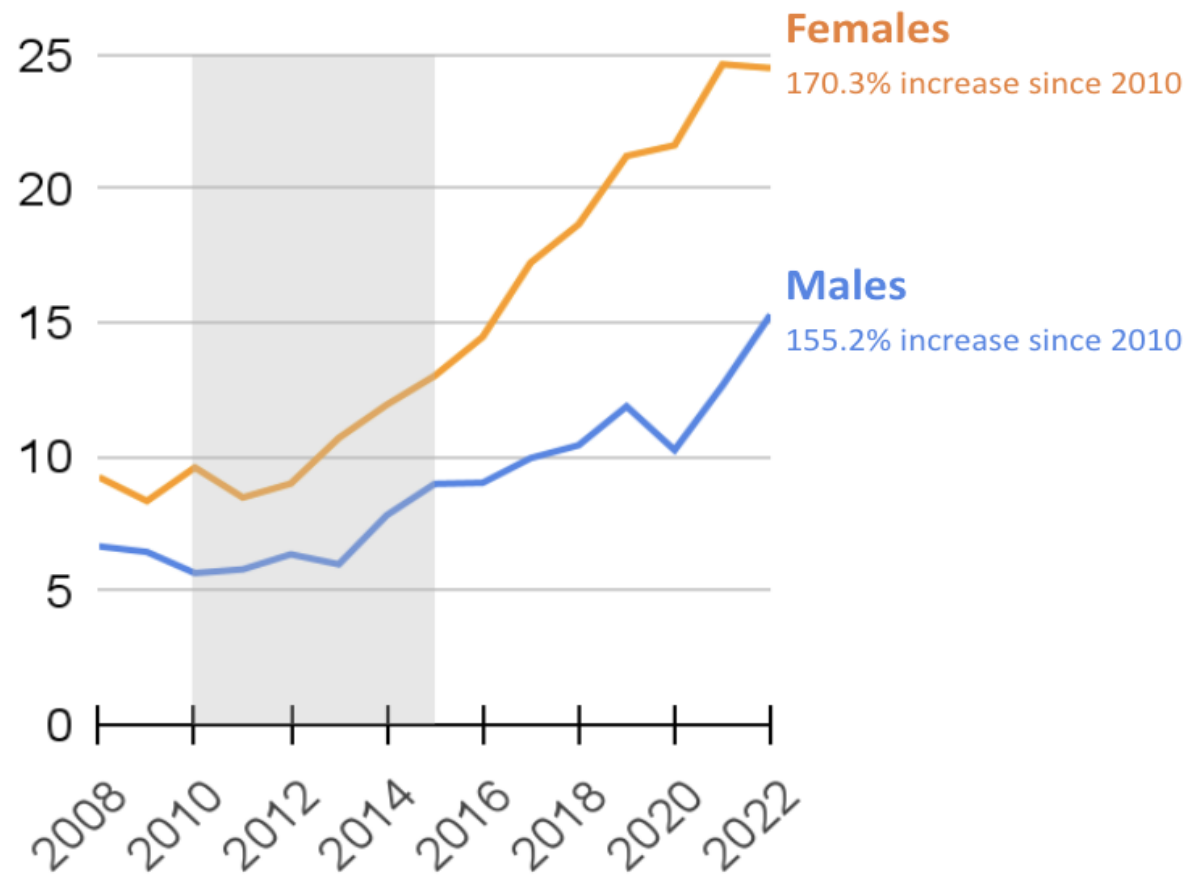
MR

# Overview of Presentation

- **May is Mental Health Awareness Month**
- **Evolving Mental Health Crisis in Youth and Data Points**
- **Role of 31n supports in Michigan Schools**
- **ROHS 31n data of support – finances and services since 2021**



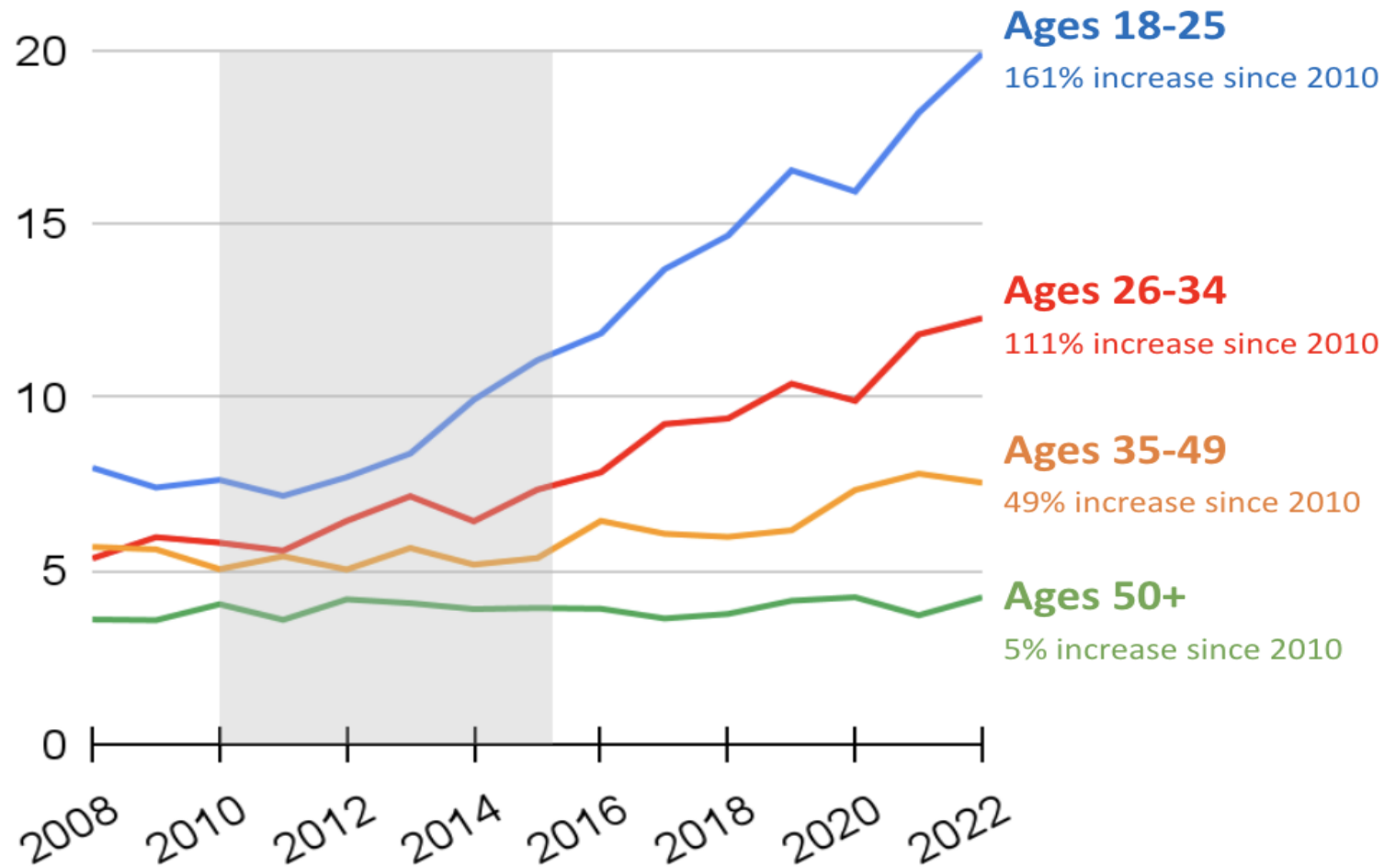
# Percent Anxiety Prevalence, U.S. Young Adults (18-25)



SOURCE: U.S. National Survey on Drug Use and Health

**Figure S1.2.5** Percent of U.S. young adults (ages 18-25) reporting high levels of anxiety. Source: U.S. National Survey on Drug Use and Health. [Zach's Spreadsheet](#). See more on U.S. mental health trends in [Adolescent Mood Disorders Since 2010: A Collaborative Review](#).

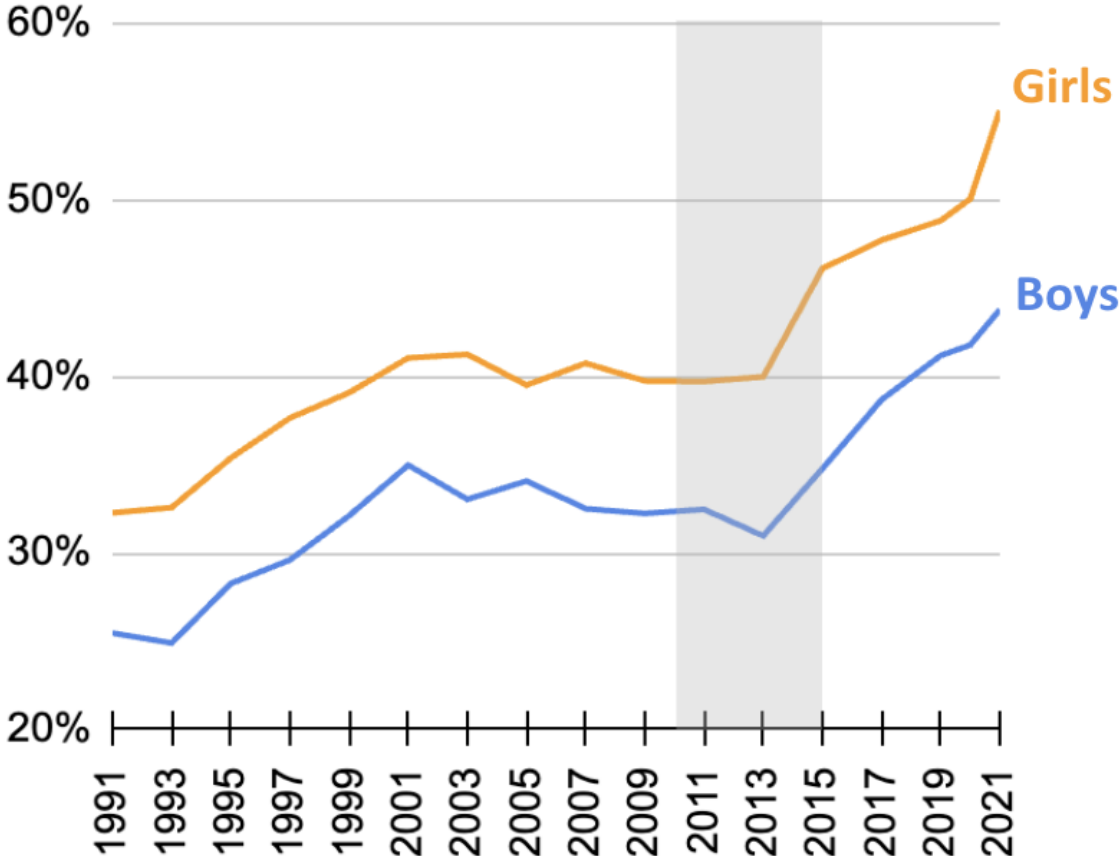
# Percent U.S. Anxiety Prevalence



*SOURCE: U.S. National Survey on Drug Use and Health*

**Figure S1.2.4** Percent of U.S. adults reporting high levels of anxiety. Source: U.S. National Survey on Drug Use and Health, re-graphed from [Goodwin, Weinberger, Kim, Wu, & Galea \(2020\)](#) and updated with 2019-2022 data. [[Zach's Spreadsheet](#)]. See more on U.S. mental health trends in [Adolescent Mood Disorders Since 2010: A Collaborative Review](#).

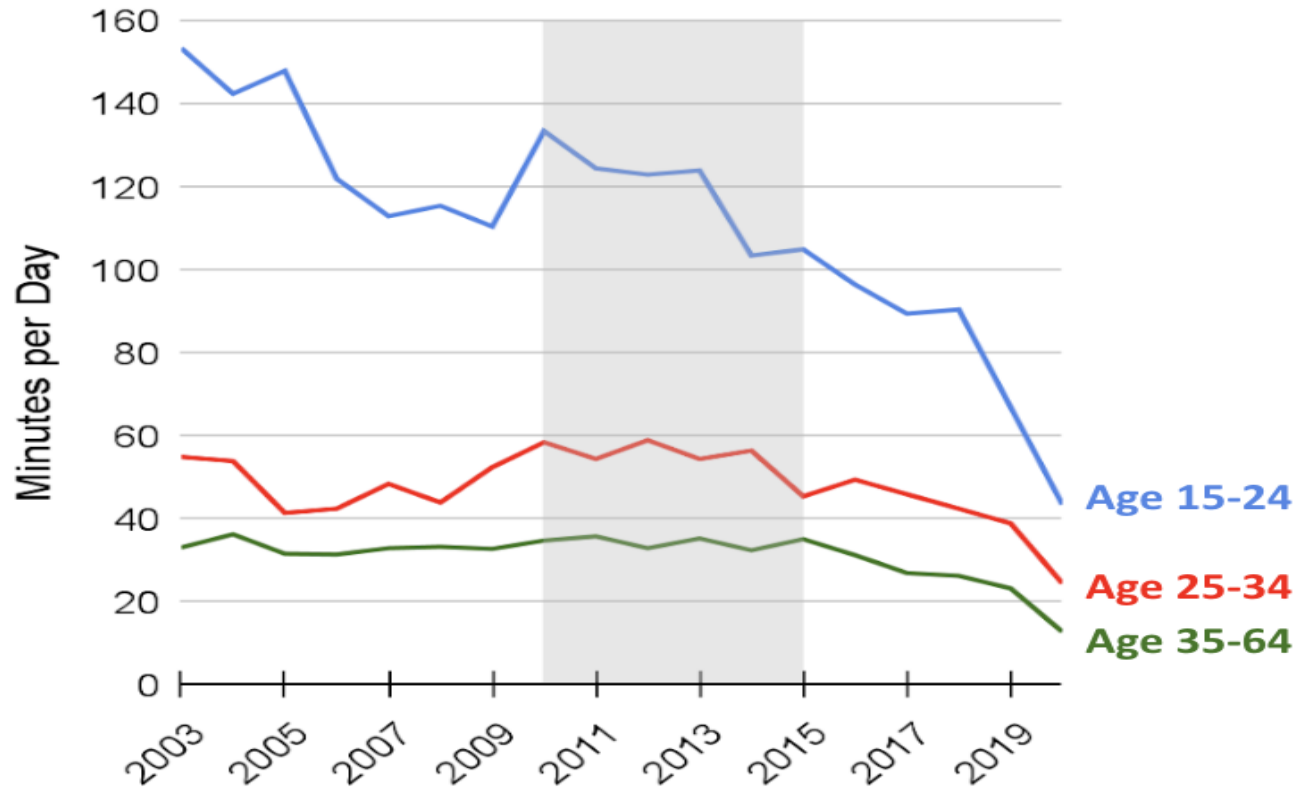
# Sleep Less Than 7 Hours a Day (USA 8th, 10th, and 12th Graders)



SOURCE: Monitoring the Future, Pooled Average, Weighted, 2020 and 2021 separate, 2-year-buckets

Figure S5.5.1 Percent of U.S. teens who get less than 7 hours of sleep on most nights. (Source: Monitoring the Future, Two-year buckets, weighted). [\[Zach's spreadsheet\]](#) [\[MtF Github\]](#)

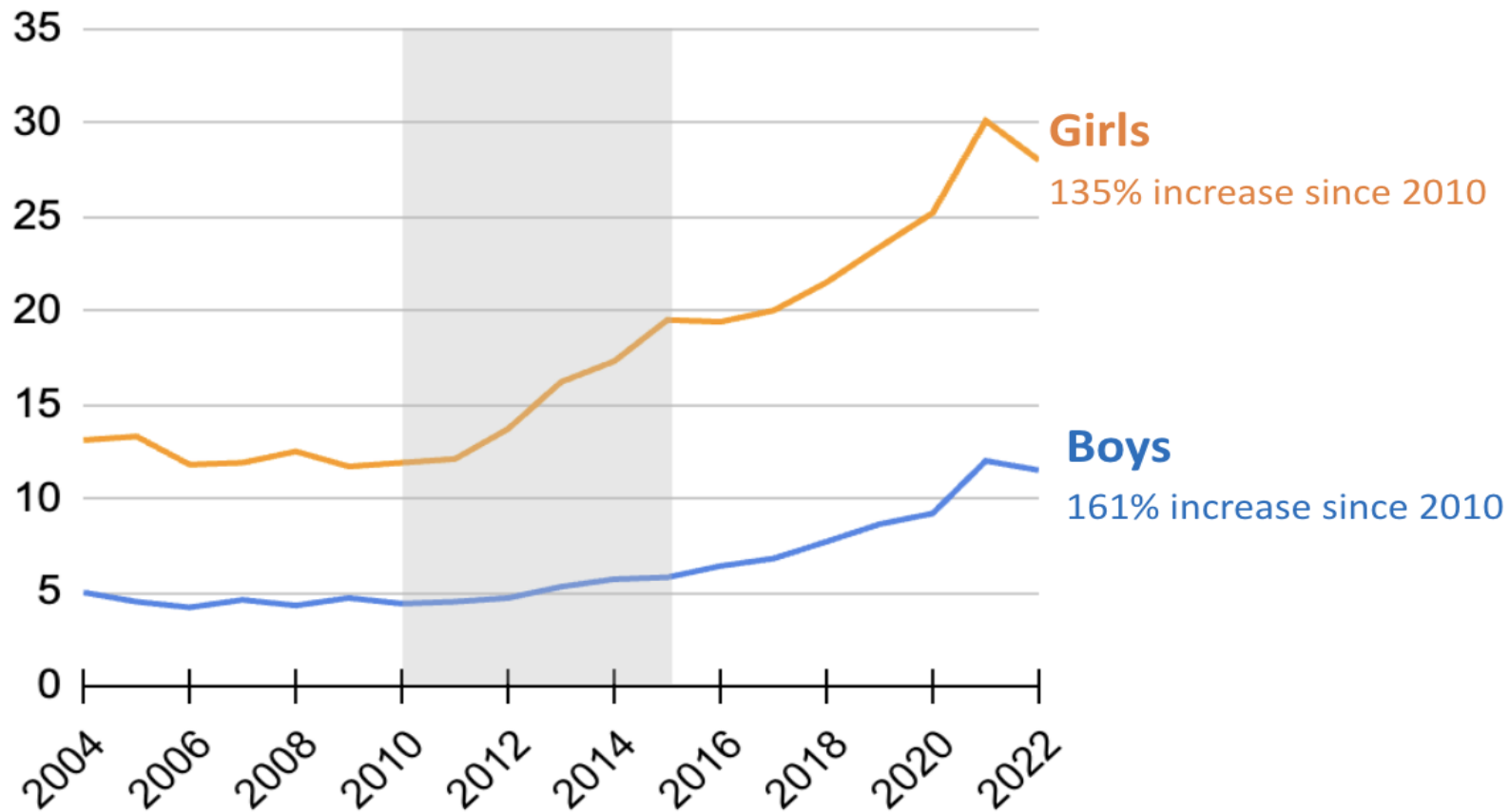
# Daily Avg Time with Friends (minutes)



*SOURCE: Kannan & Veazie (2023) analyzing the American Time Use Study.*

**S5.4.1** Daily average time spent with friends, in minutes. From [Kannan & Veazie \(2023\)](#), re-graphed by Haidt, analyzing the [American Time Use Study](#). Only the youngest age group showed a sharp drop before the 2020 data collection, which was performed after COVID restrictions had begun. That youngest group was all Gen Z in 2020, while the 2nd youngest group was millennials. [Zach's spreadsheet](#)

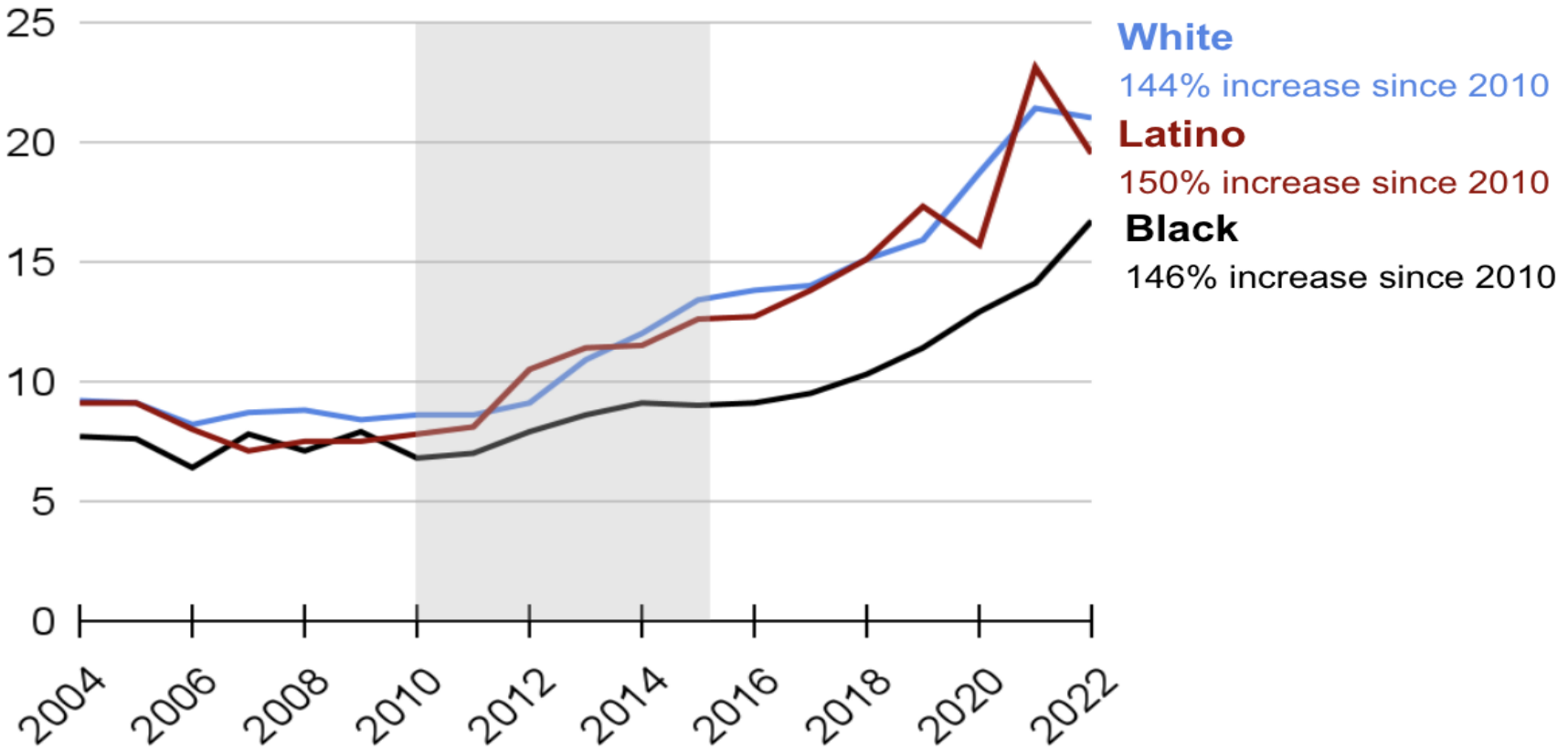
# Major Depression Among Teens



SOURCE: U.S. National Survey on Drug Use and Health

**Figure S1.1.1** Percent of U.S. teens (ages 12-17) who had at least one major depressive episode in the past year (by self-report based on a symptom checklist). Data from [U.S. National Survey on Drug Use and Health](#). This was Figure 7.1 in *The Coddling of the American Mind*, now updated with data beyond 2016. [[Zach's Spreadsheet](#)]. See more on U.S. mental health trends in [Adolescent Mood Disorders Since 2010: A Collaborative Review](#).

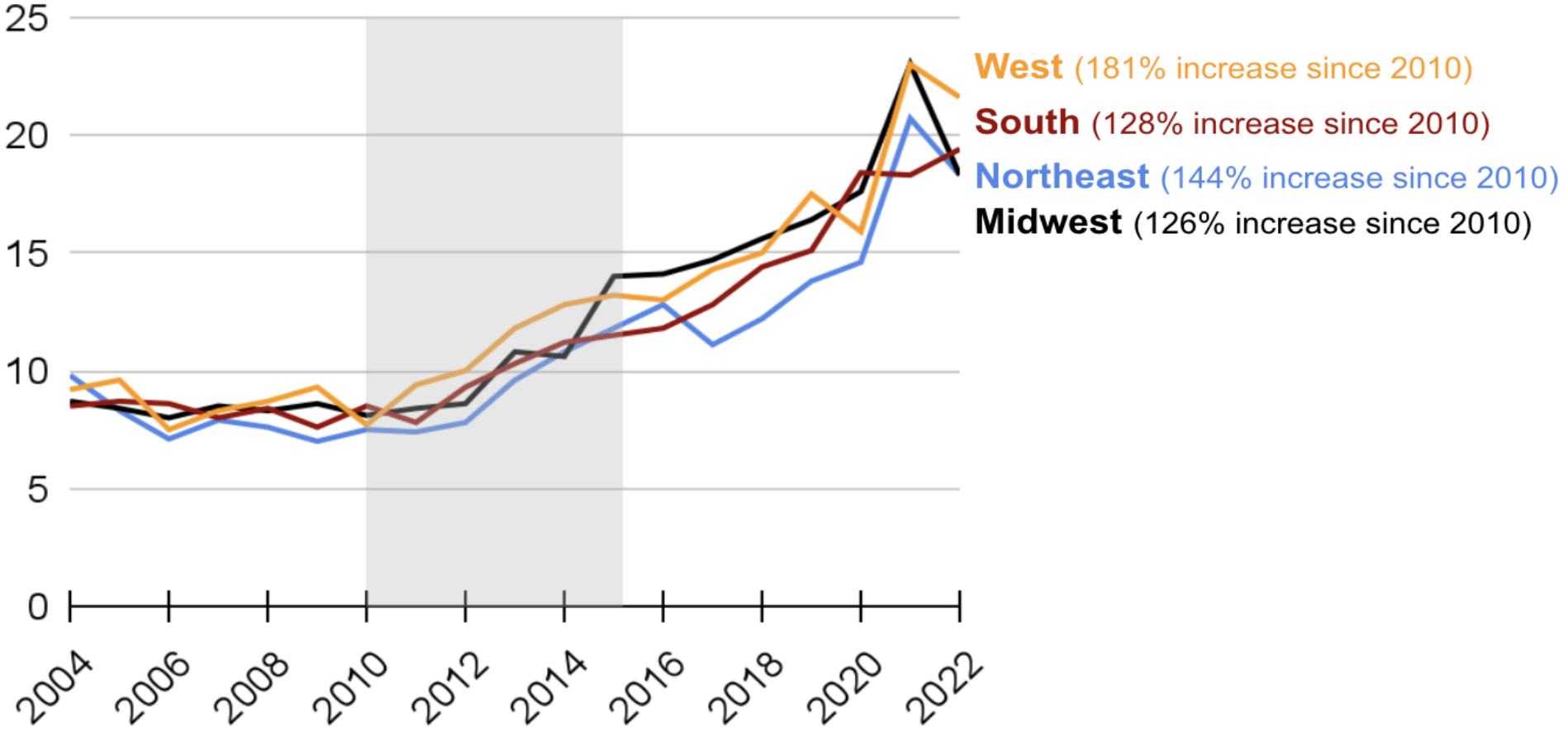
# Major Depression Among Teens by Race



SOURCE: U.S. National Survey on Drug Use and Health

**Figure S1.1.2** Percent of U.S. teens (ages 12-17) who had at least one major depressive episode in the past year (by self-report based on a symptom checklist), by race. Data from [U.S. National Survey on Drug Use and Health](#). [[Zach's Spreadsheet](#)]

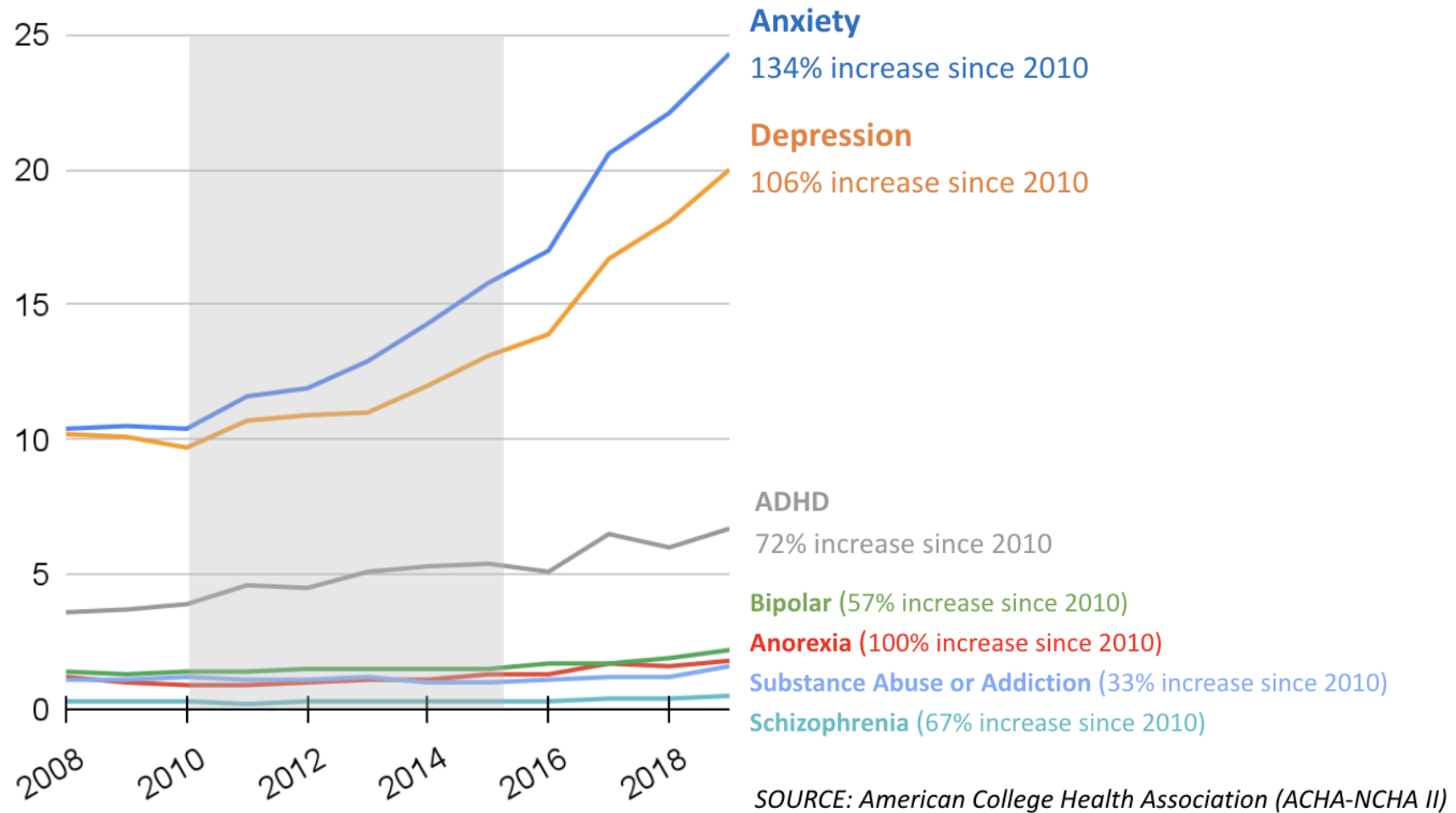
# Major Depression Among Teens by Region



SOURCE: U.S. National Survey on Drug Use and Health

Figure S1.1.3 Percent of U.S. teens (ages 12-17) who had at least one major depressive episode in the past year (by self-report based on a symptom checklist), by region. Data from [U.S. National Survey on Drug Use and Health](#). [Zach's spreadsheet]

# Percent of U.S. Undergraduates Diagnosed with a Mental Illness



**Figure S1.2.1** Percent of U.S. Undergraduates Diagnosed with a Mental Illness. [American College Health Association](#). [[Zach's spreadsheet](#)]. See more on U.S. mental health trends in [Adolescent Mood Disorders Since 2010: A Collaborative Review](#). Methodology changes occur after 2019, which prevents the continued collection of data points.

# Common Disorders that Affect Children

- **Attention-deficit/hyperactivity disorder (ADHD):** A neurodevelopmental disorder that can cause difficulty paying attention, acting on impulse, or being too active
- **Autism spectrum disorder (ASD):** A neurological condition that can cause difficulty talking and connecting with others
- **Conduct disorder:** A disruptive behavior disorder that can include aggression, destruction of property, deceitfulness, or theft
- **Disruptive mood dysregulation disorder (DMDD):** A new disorder in the DSM-5 that replaced pediatric bipolar disorder (PBD)
- **Eating disorders:** Can include unhealthy focus on body type, disordered thinking about weight, and unsafe eating habits
- **Anxiety disorders:** Can include social anxiety, generalized anxiety, and obsessive-compulsive disorders

# Common Disorders that Affect Children

- **Intermittent explosive disorder (IED):** A disruptive behavior disorder that can include impulsive outbursts such as temper tantrums, verbal or physical fights, or property damage
- **Specific learning disorder:** Can include shortcomings in academic skill development, such as reading disorder
- **Intellectual disability**
- **Communication disorders**
- **Post-traumatic stress disorder (PTSD)**

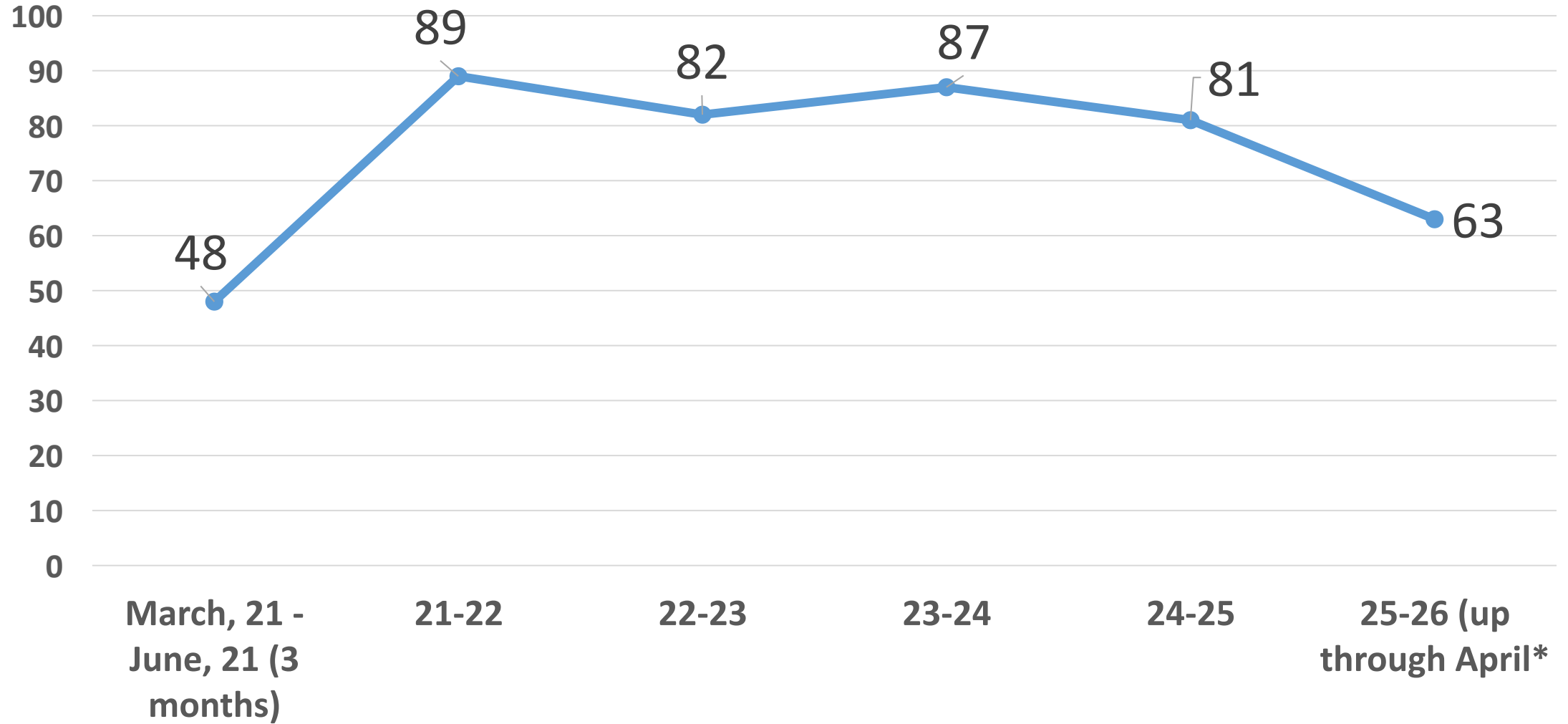


# **31n School-Based Mental Health Services**

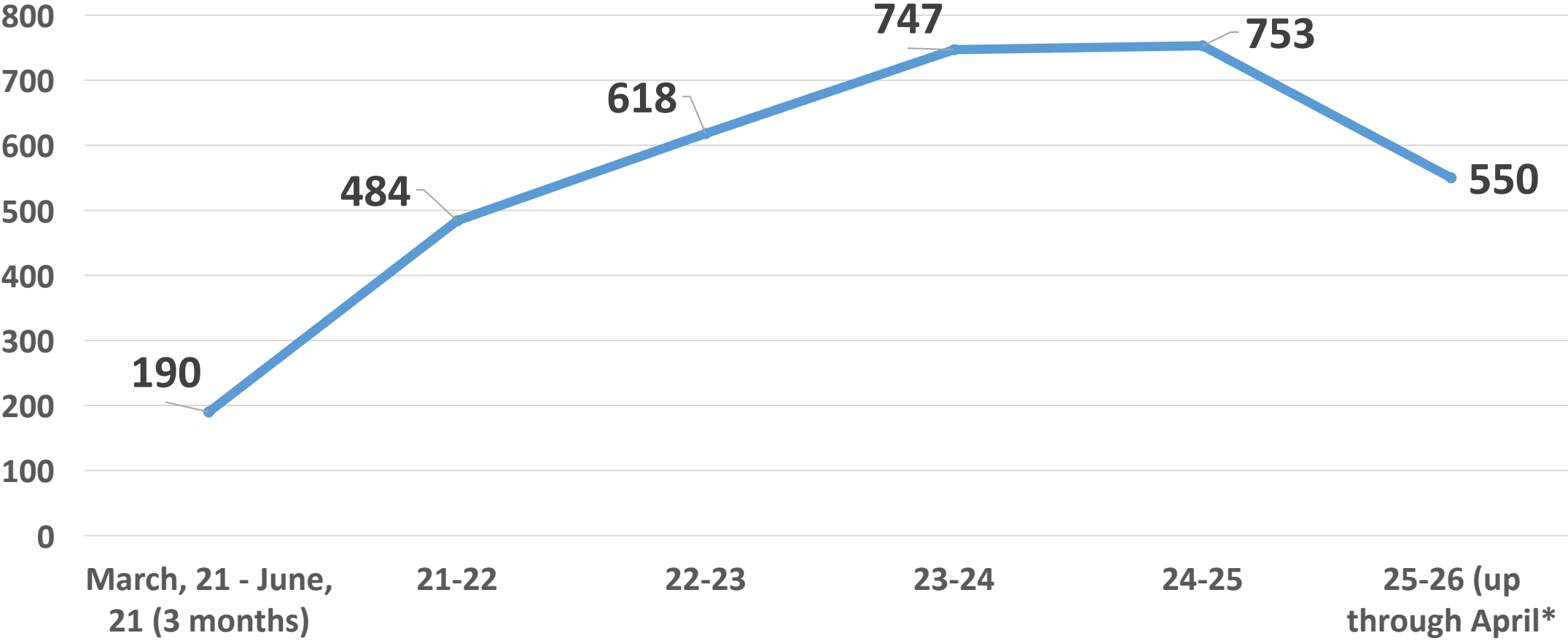
# 31n Grant Award Funds to Royal Oak Schools

Year of Grant	Grant Award
2020-2021 (Grant work began March 1, 2021)	\$54,928
2021-2022 School Year	\$138,670
2022-2023 School Year	\$157,448
2023-2024 School Year	\$126,065
2024-2025 School Year	\$237,908
2025-2026 School Year	\$263,783
<b>TOTAL TO DATE</b>	<b>\$978,802</b>

# 31n Referrals at ROHS



# Therapy Sessions (Individual, Group, Family)





# May DEI Updates

**Staff Appreciation**

**MDE Training**

**ROS Ad Council Belonging Series**

**OS Systems of Inequity Series**

**Student/Club Visits**

**ROS JEDI Council Awards + Challenges**

**Neurodiversity Support- ROPAC Reminder**

**RO Juneteenth**

**2026 OS JEDI Student Summit**





# ROS Staff Appreciation



ROYAL OAK SCHOOLS  
A COMMUNITY OF EXCELLENCE



STAFF APPRECIATION 2026

## Royal Oak Schools Staff May Discount



Indulge in fresh Mediterranean Fusion  
with our special offer:

---

15% off during the  
month of May

---

Must show Royal  
Oak Schools staff ID  
when paying



# Thank you

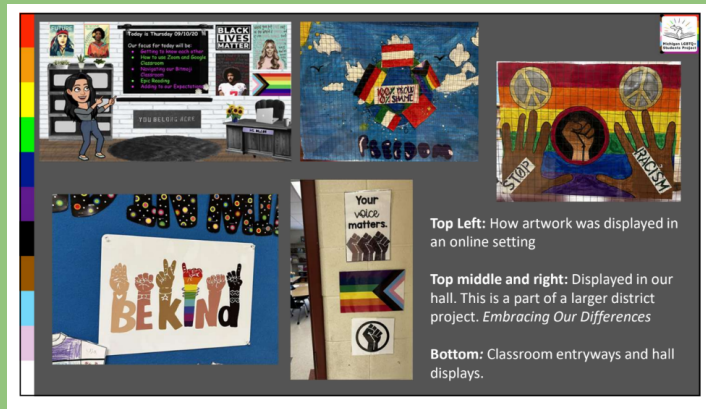
# 2025- 2026 MDE + ROS LGBTQ+ Support Training

Safe, Supportive and Inclusive Classrooms: Practical Strategies for Affirming LGBTQ+ Elementary Students



## Classroom Strategies

**LGBTQ+ student safety and inclusion in the classroom**



Top Left: How artwork was displayed in an online setting

Top middle and right: Displayed in our hall. This is a part of a larger district project. *Embracing Our Differences*

Bottom: Classroom entryways and hall displays.

**Curriculum, Classroom Imagery, and Lesson Considerations**

### USE A CRITICAL LENS WITH CURRICULAR MATERIALS

- Challenge ideas that reinforce gender roles/assumptions about one's gender
- Be mindful of assumptions/stereotypes that are embedded in prescribed curricular materials
- Introduce alternative/supplemental texts that cover the same standards, and include representation of LGBTQ+ folk

### CREATE A WELCOMING AND SAFE PLACE

- Mission statements (school, class, individual)
- Class norms and agreements
- Share your pronouns and invite students to share theirs
- Teach and model restorative practices
- Build a culture of empathy
- Hang posters, images, artwork and have books centering LGBTQ+ folk

### FIND SUPPORTS

- Find/create support systems in your school who share your drive to support LGBTQ+ students, families, and stakeholders
- Reach out to local bookstores, centers, schools, etc. for resources and support
- Use the district's Mission/Vision statement to support you
- Follow activists and community leaders on social media

# 2025- 2026 MDE + ROS LGBTQ+ Support Training

## When Bias Gets in the Way: How to Recognize and Address Barriers to Supporting LGBTQ+ Students and Families



**Implicit Bias**

**Impact vs. Intent**

**Collaborating with Caregivers**

## BEST PRACTICE STRATEGIES: FAMILIES

- Engage, approach, and connect with families and caregivers by meeting them “where they are,” and view each family as an ally.
- Give families respectful language to talk about sexual orientation and gender identity.
- Let parents and caregivers tell their story.
- Educate families on how family rejecting behaviors affect their LGBTQ child.
- Educate families on how supportive and accepting behaviors affect their LGBTQ child.
- Don’t give up.

Source: Substance Abuse and Mental Health Services Administration, A Practitioner’s Resource Guide: Helping Families to Support Their LGBT Children. HHS Publication No. PEPL-18-0018. Rockville, MD: Substance Abuse and Mental Health Services Administration, 2018.



## BEST PRACTICE STRATEGIES: TIPS FOR GIVING FEEDBACK TO COLLEAGUES

- Context matters
- Availability of the receiver
- **Create context for the feedback**
- Intent and tone
- Be present
- Helpful
- Clear
- **Try to balance what’s working and suggestions for improvement**
- Three kinds of feedback: *I see. I feel. I imagine.*
- Avoid judgments
- Try to avoid third-party feedback
- **Be prepared to deal with the impact of the feedback**
- Evaluate your feedback

Source: Robert Gass, How to Give Feedback, Social Transformation Project (2013). Can be retrieved at [stproject.org/resources/tools-for-transformation](http://stproject.org/resources/tools-for-transformation)





**ROYAL OAK SCHOOLS**

**Ad Council/K-12 Meeting**

*"Seeing Belonging": Learning to Notice What We Have Normalized*

## Restorative + **Reflective** Leadership

### Leadership Mirror Activity



#### **Rearview Reflections**

Take a look into your new mirror.

Answer the following questions:

When people leave a conversation with me, what do they feel?

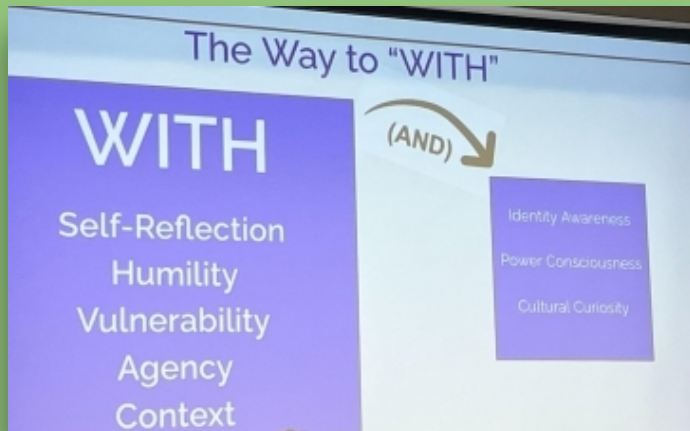
Who tends to feel most comfortable around me?

Who might feel cautious, invisible, or guarded?

What version of me shows up when I'm rushed?

What version of me shows up when I feel challenged?

Use the last few minutes to share (at your comfort level) your observations with an active listening partner. You can also use silent reflection and/or journaling at this time.



The Way to "WITH"

**WITH**

- Self-Reflection
- Humility
- Vulnerability
- Agency
- Context

(AND)

- Identity Awareness
- Power Consciousness
- Cultural Curiosity

# 2025-2026 Systems of Inequity Series Conclusion



Oakland  
Schools

## “Unmasking Educational Equity”



## “Containment” Reading

Former private  
school student  
w/curiosity  
about public  
schools

Benjamin N. Cardozo School of Law, she served on the Biden administration's Presidential Commission on the Supreme Court of the United States and as an expert commentator on the Netflix series *Amend: The Fight for America* and the Showtime series *Deadlocked: How America Shaped the Supreme Court*. Her writing has appeared in *The New Yorker*, *The Yale Law Journal*, *California Law Review*, and other publications. Her first book, *The Containment*, received the 2025 MAAH Stone Book Award, and was named a *New York Times* Notable Book of the year. She was born and grew up in Detroit.



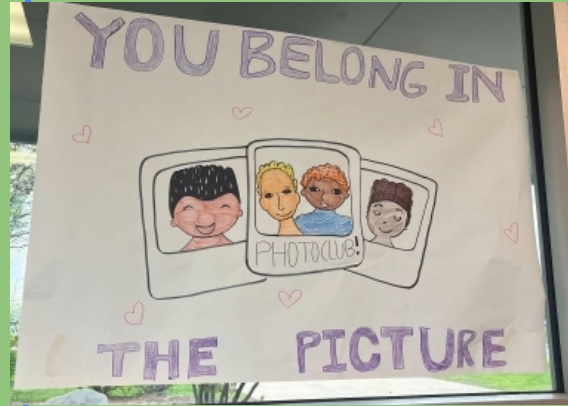
Evaluating practices  
across districts



# Student & Club Visits

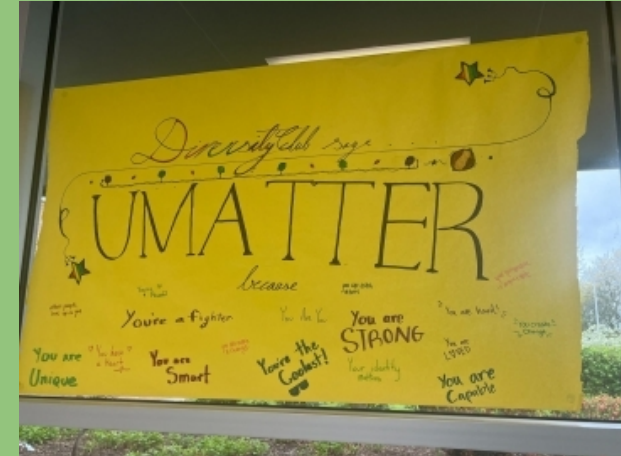
UMatter Week

PBG Club



Self Affirmations

Inclusion + Belonging Initiatives

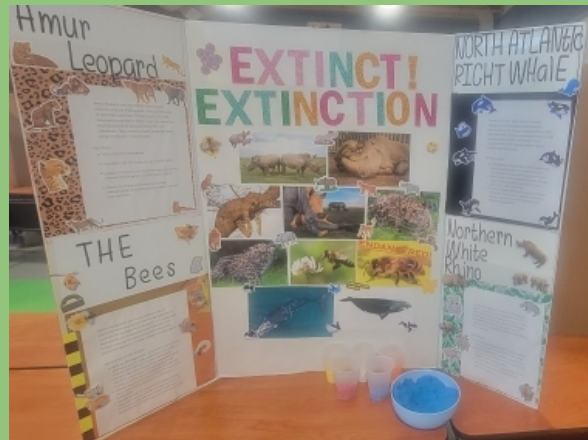


# Student & Club Visits

## ROHS Spring Fling Carnival



## Upton STEAM Night



# Student & Club Visits

## TRAILS Season Finale + Community Connections

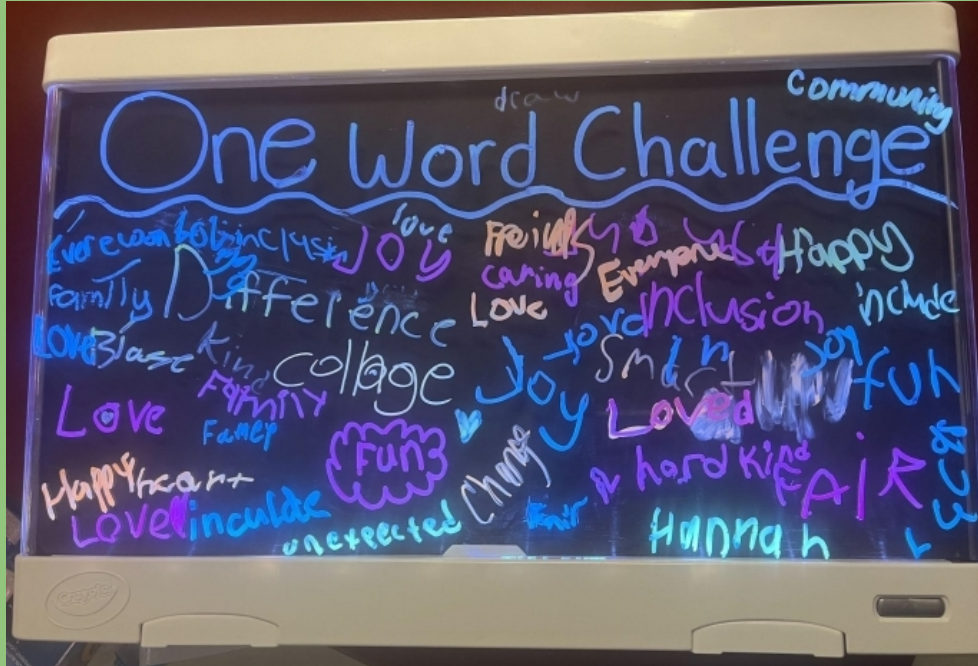
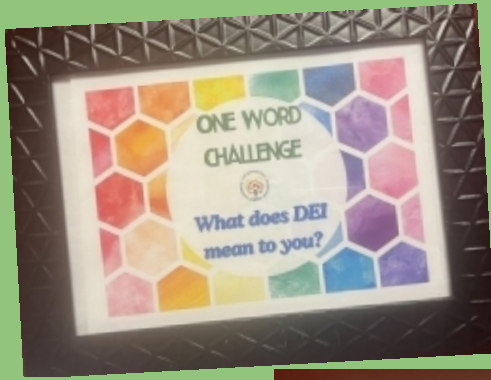


## NAEHS Ceremony



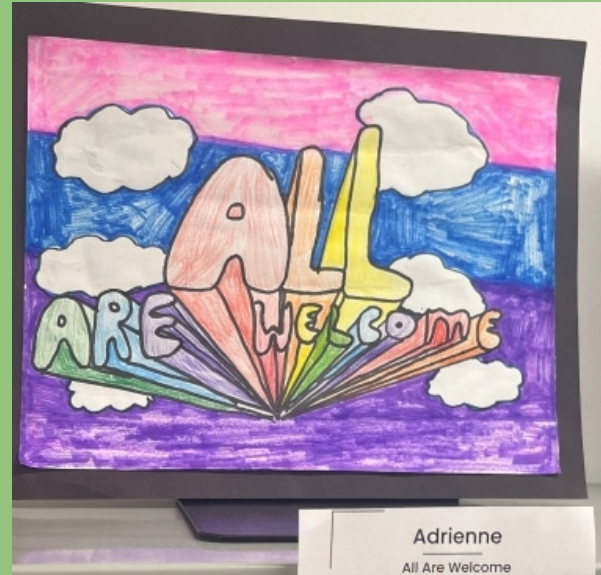
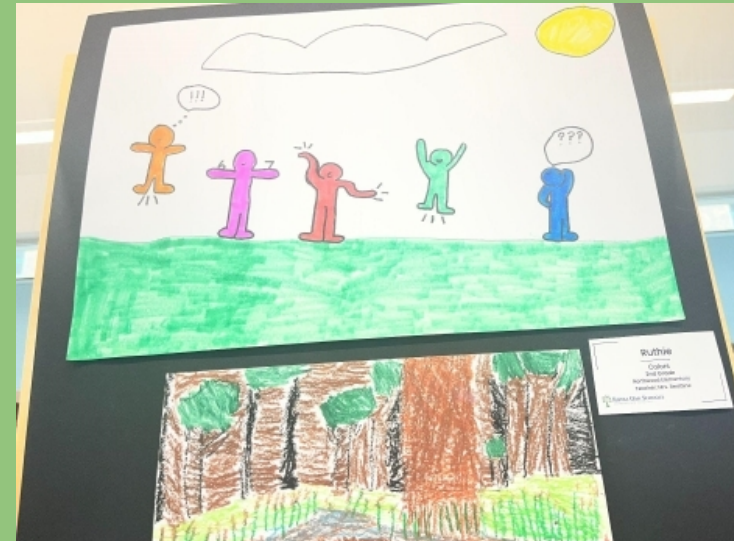
# Student & Club Visits

## Keller IFFF



# Student & Club Visits

## ROS Art Show Opening Day



Adrienne  
All Are Welcome



# Student & Club Visits

## TRAILS Family & Community Connections Night



We Rock The Spectrum - Troy/Clawson

# Summer Camps

Only \$200 per Week! Ages 4-12

<b>Week 1</b> Science Factory June 15-19	<b>Week 2-Crayola</b> Legends and Lore: Tales June 22-26	<b>Week 3</b> On the Farm June 29-July 1 Partial Week
<b>Weeks 4-6</b> "Challenge Island" S.T.E.A.M Program		
<b>Week 1 - July 6-10</b> 1pm - 4pm Silentopia 5	<b>Week 2 - July 13-17</b> 9:30am - 12:30pm Arcade Mania	<b>Week 3 - July 20-24</b> 1pm - 4 pm Jurassic Island
<b>Week 7-Crayola</b> Legends and Lore: Fables July 27-31	<b>Week 8</b> Character Week August 3-7	<b>Week 9-Crayola</b> Wild World: Animal Rescuers August 10-14
<b>Mon - Fri</b> 9:30am-12:30pm Click Here to Register!	<b>Week 10</b> Under the Sea August 17-21	10 Weeks of fun! 5 Days/Week

For More Information:  
248-220-6328  
info@wecrockspectrumtroyclawson.com  
www.wecrockspectrumtroyclawson.com



# Infinite Impact Awards

# ROS JEDI Council

# Connection, Community, & Creativity Challenge



The Royal Oak Schools JEDI Council presents the:

## CONNECTION, COMMUNITY, & CREATIVITY CHALLENGE

"We Are Better Together"

**Show Your Creativity**  
Submit original creative works that reflect the theme, "We Are Better Together".

**CATEGORIES:**  
Visual Art  
Poetry  
Essays/  
Personal Narratives

**SUBMISSION DEADLINE**  
All submissions must be received by  
**Friday, May 8, 2026**

**PRIZES**  
Challenge winners will receive restaurant gift cards, special awards, and much more!

**SUBMISSION & CRITERIA**  
Use the QR Code or link below to read official challenge rules, and to submit your entry.

**OPEN TO ROS STUDENTS GRADES K-12**

**SPONSORED BY**

[bit.ly/4vrgdBn](https://bit.ly/4vrgdBn)

**May 21st**  
**6:00pm-7:30pm**



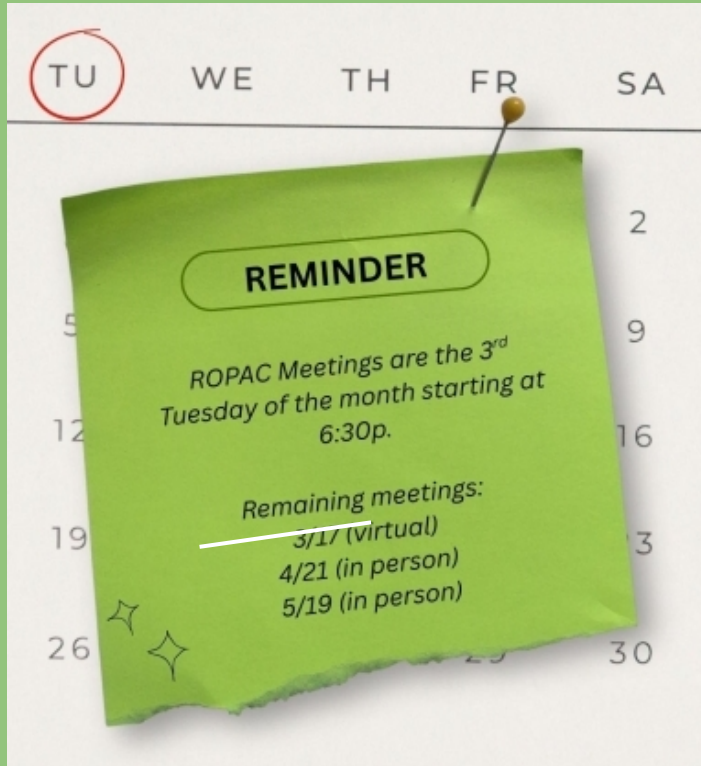
**ROYAL OAK SCHOOLS FOUNDATION**  
ENRICHING LIVES THROUGH EDUCATIONAL OPPORTUNITY

# ROPAC Reminder

## Royal Oak Parent Advocacy Committee

**May 19th**  
**6:30pm-8pm**

**ROS Administration Office**



# Upcoming Activities & Events

CITY OF ROYAL OAK  
**6TH ANNUAL**  
**JUNETEENTH**  
**CELEBRATION**

*We honor the past and celebrate the future*

 **FRIDAY, JUNE 19, 2026**  
3:00 PM – 7:00 PM

 **ROYAL OAK FARMERS MARKET**

**COMMUNITY VENDORS**  
*Free*

We welcome local organizations, small businesses, and community partners.

-  Connect with the community
-  Share your products and services
-  Be part of a powerful celebration of culture, history and freedom

**VENDORS WELCOME**

**FOOD TRUCKS**  
*Now Accepting*

-  High community attendance expected
-  Family-friendly atmosphere
-  Great exposure and sales opportunity

**COME GET SOME**  
*Good Food*

*Reserve Your Spot*

 248-210-1604  LaToya Stewart  Events@thegunuteam313.com

**FUN FOR THE ENTIRE FAMILY**  
Food • Music • Culture • Community

**FREE EVENT — ALL ARE WELCOME**



[romi.gov](http://romi.gov)



## CELEBRATE Juneteenth

Journey to Juneteenth: What Does Freedom Mean Today?

### Oakland County's 4th Annual Juneteenth Celebration: Student Art & Essay Contest

Join us in honoring freedom, culture, and history!  
Oakland County invites all K–12 and Secondary school students who live in or attend school in Oakland County to celebrate Juneteenth by submitting original artwork or essays reflecting this year's theme:

**Journey to Juneteenth: What Does Freedom Mean Today?**

#### Six Winners Total

One winner in each category (art & essay) across four groups:

- K–3rd Grade
- 4th–7th Grade
- 8th–12th Grade
- Secondary School

#### Key Dates:

- Submissions Due: Friday, May 29, 2026
- Winners Notified: Tuesday, June 9, 2026
- Award Ceremony: Thursday, June 18, 2026 at the Juneteenth Celebration

Prize: \$150 Gift Card + Featured Display at the County Executive Office, Website, and Celebration.



Visit [OakGov.info/JuneteenthContest26](http://OakGov.info/JuneteenthContest26) or use the camera on your phone to scan the QR code for more information.

For full guidelines or questions, contact Bobbie Benton at [bentonb@oakgov.com](mailto:bentonb@oakgov.com)

**THURSDAY JUNE 18, 2026**

11 a.m. - 2 p.m.

**Oakland County Courthouse**  
South Entrance Lawn  
1200 N. Telegraph Rd • Pontiac



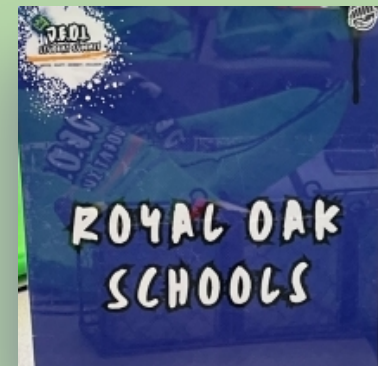
[oakgov.com](http://oakgov.com)



# 2026 OS JEDI Student Summit



Oakland  
Schools

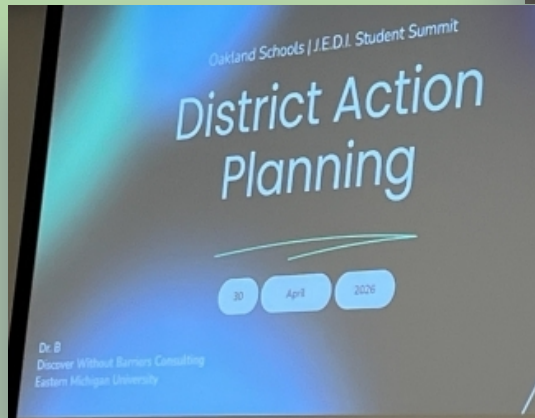
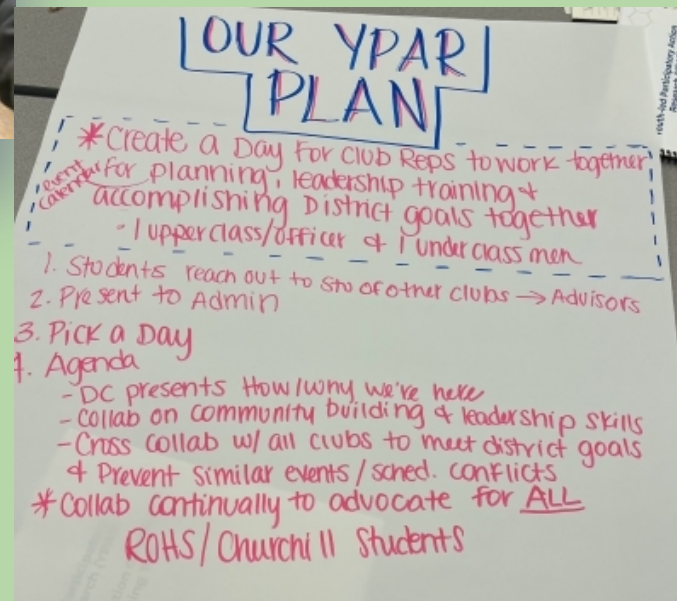




# 2026 OS JEDI Student Summit



Oakland  
Schools



## Reflections

6.8. Student Representatives to the Board  
**Presenter:** Leilani Hamilton and Grace Hatton

7. COMMUNICATIONS

**Presenter:** Board of Education Secretary

8. \*CONSENT AGENDA (*Personnel / Instruction / Business*)

66

### Check Register April 2026

Check Number	Check Date	Vendor ID	Vendor Name	Check Amount
00226444	4/9/2026	009076	ARBOR OAKLAND GROUP	1,167.00
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00226447	4/9/2026	002873	BIO RAD LABORATORIES INC	183.93
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00226449	4/9/2026	007162	BURKES SPORT HAVEN. INC.	1,093.00
00226450	4/9/2026	008676	CERTIPORT A BUSINESS OF NCS PE	3,952.00
00226451	4/9/2026	001289	COREWELL HEALTH	4,080.00
00226452	4/9/2026	404517	CRAYOLA IMAGINE ARTS ACADEMY	784.08
00226453	4/9/2026	404517	CRAYOLA IMAGINE ARTS ACADEMY	2,756.16
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00226456	4/9/2026	404312	DIADEM SPORTS LLC	110.00
00226457	4/9/2026	008242	FAR THERAPEUTIC ARTS AND RECRE	2,345.00
00226458	4/9/2026	404500	GRADUATE SERVICE DETROIT	46.00
00226459	4/9/2026	403874	HARRIS , STEVE	214.00
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00226462	4/9/2026	402952	JOSTENS INC	951.25
00226463	4/9/2026	404240	LASTING IMPRESSIONS PROMOTIONS	1,080.00
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00226471	4/9/2026	007900	MICHIGAN VIRTUAL	6,880.00
00226472	4/9/2026	096165	NAGY, RONALD R	50.00
00226473	4/9/2026	404468	NATIONAL ADULT EDUCATION HONOR	500.00
00226474	4/9/2026	048470	NEFF	188.45
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00226477	4/9/2026	404560	PARK ATHLETIC SUPPLY CO	316.00
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00226485	4/9/2026	404161	WASHTENAW COMMUNITY COLLEGE	588.00
00226486	4/9/2026	006403	WEST BLOOMFIELD SCHOOL DISTRIC	100.00
00226487	4/9/2026	401188	WILLIAMS, KIRSTEN	886.96
00226488	4/9/2026	404081	ZUBKE, ALEX	92.09
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00226490	4/16/2026	404327	BEST BUY BUSINESS ADVANTAGE AC	2,035.72
00226491	4/16/2026	404583	BORDER, JILL	71.75
00226492	4/16/2026	403153	BROWN, WILLIAM	189.37
00226493	4/16/2026	006136	BSN SPORTS LLC	414.00
00226494	4/16/2026	057870	CITY OF ROYAL OAK	8,535.69
00226495	4/16/2026	057870	CITY OF ROYAL OAK	13,678.96

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00226498	4/16/2026	402522	DETROIT SCHOOL OF ROCK AND POP	500.00
00226499	4/16/2026	018360	DTE ENERGY	1,172.81
00226500	4/16/2026	403057	ELLIS, SAMANTHA	214.60
00226501	4/16/2026	403187	GIGIS PLAYHOUSE DETROIT	1,321.00
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00226503	4/16/2026	402952	JOSTENS INC	1,918.29
00226504	4/16/2026	404407	JUAN, ALICIA	96.00
00226505	4/16/2026	403117	KWONG, REGAN	289.05
00226506	4/16/2026	401393	LANGUAGELINE SERVICES INC	110.70
00226507	4/16/2026	404585	LEPRECHAUN BASEBALL CLUB	948.00
00226508	4/16/2026	005893	MCCOURTS MUSICAL INSTRUMENTS	2,054.83
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00226512	4/16/2026	404580	SARKETT, SAMANTHA	103.77
00226513	4/16/2026	404548	SCHOOL AI INC	2,600.00
00226514	4/16/2026	008728	SCHOOL MATE	465.00
00226515	4/16/2026	404496	SEATON ATHLETICS LLC	5,436.00
00226516	4/16/2026	005341	THE HENRY FORD	612.00
00226517	4/16/2026	403428	VOTTA, COURTNEY	513.74
00226518	4/16/2026	002875	WEIR, NATALIE	264.91
00226519	4/16/2026	009096	YMCA OF METRO DETROIT	1,375.00
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00226523	4/23/2026	403460	BAUGHMAN, THERESA	88.31
00226524	4/23/2026	404327	BEST BUY BUSINESS ADVANTAGE AC	6,087.99
00226525	4/23/2026	002873	BIO RAD LABORATORIES INC	222.63
00226526	4/23/2026	009334	BLOOMFIELD HILLS SCHOOL DISTRI	2,425.00
00226527	4/23/2026	098358	BREEN SCHOLARSHIP-TROY HIGH	200.00
00226528	4/23/2026	006136	BSN SPORTS LLC	90.00
00226529	4/23/2026	403231	BUCKHEIM, ALEXANDER	58.00
00226530	4/23/2026	009233	CENTRAL MICHIGAN UNIVERSITY	10,651.98
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00226532	4/23/2026	401762	CLARK, DOUG	116.00
00226533	4/23/2026	015210	CONSUMERS ENERGY COMPANY	1,694.63
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00226535	4/23/2026	404587	DIENER, WESLEY	120.00
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00226537	4/23/2026	404320	GANNETT DETROIT LOCALIQ	26,254.44
00226538	4/23/2026	404586	HABITAT FOR HUMANITY OF MICHIG	1,071.83
00226539	4/23/2026	400584	KHALEEL, SOFIA	66.63
00226540	4/23/2026	098397	MASSP	1,080.00
00226541	4/23/2026	401566	METRO DETROIT MODEL UNITED NAT	160.00
00226542	4/23/2026	096101	MHSAA	40.00
00226543	4/23/2026	404373	MY GREEN MICHIGAN	3,050.00
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00226545	4/23/2026	403186	NEW BEGINNINGS ANIMAL RESCUE	700.00
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00226555	4/23/2026	402523	VISUAL SPORTS NETWORK OF MI	126.00
00226556	4/23/2026	010243	WALEGA, MELISSA	74.75
00226557	4/23/2026	401752	WARREN CONSOLIDATED SCHOOLS	300.00
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00226567	4/30/2026	000603	CARTER CROMPTON SITE DEVELOPME	3,180.00
00226568	4/30/2026	057870	CITY OF ROYAL OAK	8,546.24
00226569	4/30/2026	404284	CLEGHORN, CHELSEA	27.55
00226570	4/30/2026	015210	CONSUMERS ENERGY COMPANY	10,769.82
00226571	4/30/2026	404188	DREAM SCENE PARTIES	1,400.00
00226572	4/30/2026	018360	DTE ENERGY	34,252.15
00226573	4/30/2026	404594	ELLIS, JESSICA	46.00
00226574	4/30/2026	403483	FARMINGTON BOWLING BOOSTERS	270.00
00226575	4/30/2026	007586	GENERAL SCOREBOARD LLC	1,097.35
00226576	4/30/2026	403187	GIGIS PLAYHOUSE DETROIT	276.00
00226577	4/30/2026	404500	GRADUATE SERVICE DETROIT	307.65
00226578	4/30/2026	401626	HARRIS, GEORGETTE	187.37
00226579	4/30/2026	095822	HAYES, PATRICIA	250.00
00226580	4/30/2026	404593	HILL, BENJAMIN	125.00
00226581	4/30/2026	404597	HPS LLC	760.00
00226582	4/30/2026	402123	KIMBERLY FENCE AND SUPPLY	1,263.00
00226583	4/30/2026	402091	LEONARDS SYRUPS	274.28
00226584	4/30/2026	401464	LESSONPIX INC	46.19
00226585	4/30/2026	404590	MILLER, IRENE	800.00
00226586	4/30/2026	403939	OZDYCH, DAISY	216.05
00226587	4/30/2026	404560	PARK ATHLETIC SUPPLY CO	2,160.00
00226588	4/30/2026	401981	REA, REBECCA	76.49
00226589	4/30/2026	009817	ROHS DRAMA BOOSTERS	1,133.37
00226590	4/30/2026	403837	SLY, NANCY	21.17
00226591	4/30/2026	005044	STATE OF MICHIGAN BUREAU OF	150.00
00226592	4/30/2026	063926	STATE OF MICHIGAN DEPT LICENSI	748.55
00226593	4/30/2026	404541	UNDERGROUND PRINTING	2,609.25
00226594	4/30/2026	068069	UNITED PARCEL SERVICE INC	5.00
00226595	4/30/2026	003514	UNIVERSITY OF MICHIGAN	195.00
Checks Issued				376,383.91
Less VOIDS				-
<b>GRAND TOTAL</b>				<b>376,383.91</b>

### Electronic Payments March 2026

Check Number	Check Date	Vendor ID	Vendor Name	Check Amount
00008572	4/1/2026	008100	BILLINGS LAWN EQUIPMENT	50,429.00
00008573	4/9/2026	001000	AERO FILTER INC	342.74
00008574	4/9/2026	402783	AMAZON.COM SERVICES LLC	17,047.94
00008575	4/9/2026	403954	AMERICAN READING COMPANY INC	3,200.00
00008576	4/9/2026	009058	APPLIED INNOVATION	6,186.89
00008577	4/9/2026	005850	AUDIO SENTRY CORP	325.00
00008578	4/9/2026	009649	BARLAGE, AMY	57.57
00008579	4/9/2026	008100	BILLINGS LAWN EQUIPMENT	61.51
00008580	4/9/2026	008670	BLICK ART MATERIALS	851.84
00008581	4/9/2026	401498	BRUNNER AVENA, AMY	82.14
00008582	4/9/2026	404566	CADILLAC TRAVEL INC	260.00
00008583	4/9/2026	402509	CINTAS CORPORATION	2,792.83
00008584	4/9/2026	013730	CLARK HILL PLC	3,933.00
00008585	4/9/2026	403659	DAVIS, NICOLE	54.30
00008586	4/9/2026	005652	DIHYDRO SERVICES INC	8,089.00
00008587	4/9/2026	404581	DS2 SURFACES LLC	13,476.00
00008588	4/9/2026	404156	FIRST TO THE FINISH	414.20
00008589	4/9/2026	403682	GROUND PENETRATING RADAR SYSTE	550.00
00008590	4/9/2026	400128	HIGHSCOPE EDUCATIONAL RESEARCH	1,898.99
00008591	4/9/2026	004947	JAYS SEPTIC TANK SERVICE	800.00
00008592	4/9/2026	035229	JONES SCHOOL SUPPLY	156.40
00008593	4/9/2026	035370	JORDANO GRAPHICS SIGNS LLC	1,228.00
00008594	4/9/2026	400836	KOIVUNEN, MEGHAN	31.90
00008595	4/9/2026	037467	KURTS KUSTOM PROMOTIONS LLC	362.51
00008596	4/9/2026	037818	LAKESHORE LEARNING MATERIALS L	151.46
00008597	4/9/2026	400415	MANAGEBAC INC	1,610.00
00008598	4/9/2026	400547	MEI TOTAL ELEVATOR SOLUTIONS	6,184.50
00008599	4/9/2026	054506	PRO ED INC	110.00
00008600	4/9/2026	055598	REALLY GOOD STUFF LLC	4,596.00
00008601	4/9/2026	057719	ROSE PEST SOLUTIONS	1,097.00
00008602	4/9/2026	069450	SCHOOL SPECIALTY LLC	88.28
00008603	4/9/2026	063680	STAPLES BUSINESS ADVANTAGE	287.40
00008604	4/9/2026	066775	THRUN LAW FIRM PC	2,522.00
00008605	4/9/2026	008965	TMP ARCHITECTURE INC	28,347.60
00008606	4/9/2026	401771	ULINE INC	1,842.14
00008607	4/9/2026	000535	VERIZON WIRELESS SERVICES LLC	2,218.34
00008608	4/9/2026	072210	WEST MUSIC COMPANY INC	168.06
00008609	4/9/2026	072372	WESTERN PSYCHOLOGICAL SERVICES	374.22
00008610	4/16/2026	404258	ABM	258,660.33
00008611	4/16/2026	402783	AMAZON.COM SERVICES LLC	15,725.19
00008612	4/16/2026	006848	AQUATIC SOURCE LLC	1,889.56
00008613	4/16/2026	008808	ARMADILLO PRINTWEAR	705.00
00008614	4/16/2026	006046	B AND H PHOTO VIDEO	7,697.85
00008615	4/16/2026	008690	BARTON MALOW BUILDERS LLC	290,127.27
00008616	4/16/2026	008670	BLICK ART MATERIALS	26.68
00008617	4/16/2026	012150	CAROLINA BIOLOGICAL SUPPLY CO	290.47
00008618	4/16/2026	400432	CARRS MOTORCOACH LLC	1,653.75
00008619	4/16/2026	006111	CEI MICHIGAN LLC	2,163.00
00008620	4/16/2026	004752	CENTRAL MICHIGAN PAPER CO	740.00
00008621	4/16/2026	016656	CURRICULUM ASSOCIATES LLC	7,000.00
00008622	4/16/2026	005652	DIHYDRO SERVICES INC	3,807.00
00008623	4/16/2026	404144	DURHAM SCHOOL SERVICES LP	193,208.77

Check Number	Check Date	Vendor ID	Vendor Name	Check Amount
00008624	4/16/2026	403049	HERMON, AMY	247.50
00008625	4/16/2026	401394	INTEGRATED DESIGN SOLUTIONS LL	1,301.50
00008626	4/16/2026	004947	JAYS SEPTIC TANK SERVICE	420.00
00008627	4/16/2026	037818	LAKESHORE LEARNING MATERIALS L	99,633.07
00008628	4/16/2026	008778	LEARNING WITHOUT TEARS	2,392.61
00008629	4/16/2026	400547	MEI TOTAL ELEVATOR SOLUTIONS	1,597.75
00008630	4/16/2026	048300	NATIONAL TIME AND SIGNAL CORP	1,270.00
00008631	4/16/2026	050048	OAKLAND COMMUNITY COLLEGE	27.75
00008632	4/16/2026	050310	OAKLAND SCHOOLS	178,007.00
00008633	4/16/2026	403185	PEOPLE DRIVEN TECHNOLOGY INC	80,432.00
00008634	4/16/2026	053550	PITNEY BOWES GLOBAL FINANCIAL	1,616.83
00008635	4/16/2026	069450	SCHOOL SPECIALTY LLC	74.87
00008636	4/16/2026	063680	STAPLES BUSINESS ADVANTAGE	1,921.11
00008637	4/16/2026	403738	TOSHIBA BUSINESS SOLUTIONS	1,514.61
00008638	4/23/2026	008312	ABSOPURE WATER COMPANY LLC	58.65
00008639	4/23/2026	017923	ALEX DELVECCHIO ENT LLC	199.00
00008640	4/23/2026	402783	AMAZON.COM SERVICES LLC	5,549.83
00008641	4/23/2026	403954	AMERICAN READING COMPANY INC	4,062.00
00008642	4/23/2026	008808	ARMADILLO PRINTWEAR	336.00
00008643	4/23/2026	008670	BLICK ART MATERIALS	4.88
00008644	4/23/2026	400665	BOLHOUSE LLC	3,200.00
00008645	4/23/2026	011538	CHARTWELLS DINING	232,657.85
00008646	4/23/2026	009365	CLEAR RATE COMMUNICATIONS LLC	816.83
00008647	4/23/2026	403039	CULPEPPER, SARAH	20.81
00008648	4/23/2026	010272	DEARBORN LIFE INS CO	3,608.52
00008649	4/23/2026	005761	DELTA NETWORK SERVICES LLC	61,593.00
00008650	4/23/2026	317649	FIRE DEFENSE EQUIPMENT CO INC	3,130.56
00008651	4/23/2026	404104	GALLAGHER BENEFIT SERVICES INC	6,000.00
00008652	4/23/2026	403701	GUMBEL, MAUREEN	70.91
00008653	4/23/2026	005124	H O H WATER TECHNOLOGY INC	2,129.00
00008654	4/23/2026	097413	J W PEPPER & SON INC	199.49
00008655	4/23/2026	035160	JOHNSON CONTROLS INC	341.44
00008656	4/23/2026	035229	JONES SCHOOL SUPPLY	673.05
00008657	4/23/2026	009957	KRANTZ, KATHLEEN	59.09
00008658	4/23/2026	008885	LOGISOFT COMPUTER PRODUCTS LLC	312.90
00008659	4/23/2026	006429	MCCUTCHEN, BARBARA	112.67
00008660	4/23/2026	400547	MEI TOTAL ELEVATOR SOLUTIONS	1,457.83
00008661	4/23/2026	400330	MENARY, LORI	18.27
00008662	4/23/2026	093086	MILLAR, DARRIN	116.00
00008663	4/23/2026	050310	OAKLAND SCHOOLS	60.00
00008664	4/23/2026	008905	OAKLAND SCHOOLS PRODUCTION	536.70
00008665	4/23/2026	403867	OLIVER, SUSANNAH	98.46
00008666	4/23/2026	051095	ORIENTAL TRADING COMPANY	31.96
00008667	4/23/2026	402919	PALMERI, MELANIE	57.28
00008668	4/23/2026	007673	PAR INC.	583.20
00008669	4/23/2026	404346	PERKINS, JENNIFER	25.96
00008670	4/23/2026	403112	QUENCH USA INC	108.90
00008671	4/23/2026	055598	REALLY GOOD STUFF LLC	18.42
00008672	4/23/2026	007669	RIDDELL ALL AMERICAN SPORTS	1,854.10
00008673	4/23/2026	058421	RUNYAN POTTERY SUPPLY	29.85
00008674	4/23/2026	069450	SCHOOL SPECIALTY LLC	84.97
00008675	4/23/2026	403776	SCHWARB, AMY	62.79
00008676	4/23/2026	063680	STAPLES BUSINESS ADVANTAGE	1,511.03
00008677	4/23/2026	404218	SZMANSKY, THERESA	128.83

Check Number	Check Date	Vendor ID	Vendor Name	Check Amount
00008678	4/23/2026	007880	TES THERAPY	6,070.00
00008679	4/23/2026	403738	TOSHIBA BUSINESS SOLUTIONS	3,961.47
00008680	4/23/2026	403090	US OMNI AND TSACG COMPLIANCE S	377.88
00008681	4/23/2026	005839	WORRY FREE LAWN CARE SNOW REMO	3,895.00
00008682	4/23/2026	403381	YESKO, SARAH	57.20
00008683	4/23/2026	008022	ZAVISLAK, ANGELA	72.94
00008684	4/30/2026	033200	21ST CENTURY MEDIA NEWSPAPER L	1,566.95
00008685	4/30/2026	008722	ABELA, KATHY	229.25
00008686	4/30/2026	001000	AERO FILTER INC	4,531.61
00008687	4/30/2026	017923	ALEX DELVECCHIO ENT LLC	923.25
00008688	4/30/2026	402783	AMAZON.COM SERVICES LLC	4,473.01
00008689	4/30/2026	009058	APPLIED INNOVATION	3,072.24
00008690	4/30/2026	006848	AQUATIC SOURCE LLC	332.49
00008691	4/30/2026	005850	AUDIO SENTRY CORP	430.00
00008692	4/30/2026	003671	BOYCE, KIMBERLY	23.20
00008693	4/30/2026	401498	BRUNNER AVENA, AMY	44.73
00008694	4/30/2026	006111	CEI MICHIGAN LLC	580.00
00008695	4/30/2026	013730	CLARK HILL PLC	7,107.00
00008696	4/30/2026	404035	CMS ERM MICHIGAN LLC	68,034.37
00008697	4/30/2026	401440	CNS ELECTRIC CO	10,763.63
00008698	4/30/2026	007821	CORRIDOR, MICHAEL	82.65
00008699	4/30/2026	019357	DINN BROS INC	52.25
00008700	4/30/2026	404209	FENCE CONNECTION LLC	9,477.00
00008701	4/30/2026	006352	INTERNATIONAL BACCALAUREATE OR	441.00
00008702	4/30/2026	004579	JASKI, MATHEW	654.40
00008703	4/30/2026	403443	KNIPPER, JENNIFER	31.32
00008704	4/30/2026	037467	KURTS KUSTOM PROMOTIONS LLC	1,652.20
00008705	4/30/2026	402621	LARKIN ENGINEERING LLC	5,856.00
00008706	4/30/2026	009875	LETKIEWICZ, JEREMY	217.79
00008707	4/30/2026	404213	MAKEMUSIC INC	1,047.44
00008708	4/30/2026	404107	MANOLIAS, MARIA	70.27
00008709	4/30/2026	400547	MEI TOTAL ELEVATOR SOLUTIONS	1,190.97
00008710	4/30/2026	048300	NATIONAL TIME AND SIGNAL CORP	336.23
00008711	4/30/2026	400191	NOVA ENVIRONMENTAL INC	8,316.25
00008712	4/30/2026	050310	OAKLAND SCHOOLS	65.00
00008713	4/30/2026	008905	OAKLAND SCHOOLS PRODUCTION	500.00
00008714	4/30/2026	403461	PALLISCHECK, ANNE	54.52
00008715	4/30/2026	401748	PREMIER RELOCATIONS LLC	3,400.00
00008716	4/30/2026	403112	QUENCH USA INC	88.85
00008717	4/30/2026	003291	ROEDER, JAMES	34.37
00008718	4/30/2026	004599	ROSE, ALBIN	31.32
00008719	4/30/2026	005792	SCHOLASTIC INC	31.96
00008720	4/30/2026	403210	SWEETWATER SOUND LLC	5,036.97
00008721	4/30/2026	008965	TMP ARCHITECTURE INC	17,354.14
00008722	4/30/2026	010347	VANEVERY, JENNIFER	284.10
00008723	4/30/2026	009221	VEX ROBOTICS INC	1,252.99
00008724	4/30/2026	400891	ZUG, JOY MARIE	69.75
Electronic Payments Issued				1,822,477.22
Less VOIDS				-
<b>GRAND TOTAL</b>				<b>1,822,477.22</b>

ROYAL OAK SCHOOLS

**BILLS SUBMITTED FOR APPROVAL**

**04/30/26**

BILLS PAID:	4/01/2026 - 4/30/2026	ACCOUNTS PAYABLE - GENERAL	\$376,383.91
VENDOR EP:	4/01/2026 - 4/30/2026	ACCOUNTS PAYABLE - GENERAL	\$1,822,477.22
WIRE TRANSFERS:	4/01/2026 - 4/30/2026	WIRE TRANSFERS:	<u>\$14,183,624.65</u>
		TOTAL:	\$16,382,485.78

**GRAND TOTAL**

**\$16,382,485.78**

**WIRE TRANSFERS**

4/1/2026 - 4/30/2026

<b><u>DATE</u></b>	<b><u>PAYROLL LIABILITIES</u></b>	<b><u>TRANSFERS</u></b>	<b><u>DESCRIPTION</u></b>
4/10/2026	1,456,455.89		SUPP PAY 2/27/26
4/24/2026	1,529,684.33		
4/2/2026		125.82	MERCH SERV FEES
4/2/2026		594,309.84	ORS
4/3/2026		458.02	DTE
4/10/2026		91,184.95	EDUSTAFF
4/13/2026		12.67	CLOVER APP FEE
4/16/2026		1,455.75	DETROIT TAXES
4/17/2026		567,535.96	ORS
4/17/2026		780,179.74	MESSA
4/20/2026		15.17	SALES TAX
4/24/2026		126,412.64	EDUSTAFF
4/28/2026		32,251.18	PURCH CARD
4/28/2026		12,000.00	ARBITERPAY
4/29/2026		4,439,125.00	DEBT
4/29/2026		3,959,625.00	DEBT
4/30/2026		592,792.69	ORS
TOTAL	<u>2,986,140.22</u>	<u>11,197,484.43</u>	

TOTAL TRANSFERS: \$14,183,624.65

8.1. \*Payment of Expenses

9. MATTERS FOR DISCUSSION / ACTION

9.1. Superintendent

**Presenter:** John Tafelski

9.1.1. Second Reading of Revised/Replaced and/or Recommended Policies on  
Nondiscrimination

75

Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Copy of SECTION 504/ADA PROHIBITION AGAINST DISCRIMINATION BASED ON DISABILITY
Code	po2260.01
Status	
Adopted	September 13, 2012
Last Revised	March 27, 2023

#### 2260.01 - **SECTION 504/ADA PROHIBITION AGAINST DISCRIMINATION BASED ON DISABILITY**

Pursuant to Section 504 of the Rehabilitation Act of 1973 ("Section 504"), the Americans with Disabilities Act of 1990, as amended ("ADA") and the implementing regulations (collectively "Section 504/ADA"), no otherwise qualified individual with a disability shall, solely by reason of **the individual's** ~~his/her~~ disability, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving Federal financial assistance. The Board of Education does not discriminate in admission or access to, or participation or treatment in its programs or activities. As such, the Board's policies and practices will not discriminate against students with disabilities and the Board will make its facilities, programs, and activities accessible to qualified individuals with disabilities. No discrimination will be knowingly permitted against any individual with a disability on the sole basis of that disability in any of the programs, activities, policies, and/or practices in the District.

"An individual with a disability" means a person who has, had a record of, or is regarded as having, a physical or mental impairment that substantially limits one or more major life activities. Major life activities are functions such as caring for one's self, performing manual tasks, walking, seeing, hearing, eating, sleeping, standing, lifting, bending, speaking, breathing, learning, reading, concentrating, thinking, communicating, and working.

Major life activities also include the operation of a major bodily function, including, but not limited to, functions of the immune system, normal cell growth, digestive, bowel, bladder, neurological, brain, respiratory, circulatory, endocrine, and reproductive functions.

An impairment that is episodic in nature or in remission is considered a disability if it would substantially limit a major life activity when active.

The determination of whether an impairment substantially limits a major life activity must be made without regard to the ameliorative effects of mitigating measures such as medication, medical supplies, equipment or appliances, low-vision devices (not including ordinary eyeglasses or contact lenses), prosthetics (including limbs and devices), hearing aids and cochlear implants or other implantable hearing devices, mobility devices, oxygen therapy equipment or supplies, assistive technology, reasonable accommodations or auxiliary aids or services, or learned behavioral or adaptive neurological modifications.

With respect to public preschool, elementary and secondary educational services, a qualified person with a disability means a disabled person:

- A. who is of an age during which nondisabled persons are provided educational services;
- B. who is of any age during which it is mandatory under Michigan law to provide educational services to disabled persons; or
- C. to whom the State is required to provide a free appropriate public education pursuant to the Individuals with Disabilities Education Improvement Act (IDEIA).

With respect to vocational education services, a qualified person with a disability means a person with a disability who meets the academic and technical standards requisite to admission or participation in the vocational program or activity. The Board will not deny a student with disabilities access to its vocational education programs or courses due to architectural and/or equipment barriers, or because the student needs related aids or services to receive an appropriate education.

## **Compliance Officer(s)**

The Board designates the following individual(s) to serve as the District's 504 Compliance Officer(s)/ADA Coordinator(s) (hereinafter referred to as the "District Compliance Officer(s)").

Patrick Wolynski  
Executive Director Staff & Student Services  
248-435-8400 x1211  
800 Devillen, Royal Oak, MI 48073  
patrick.wolynski@royaloakschools.org

Katherine Abela  
Executive Director Finance and Facilities  
248-435-8400 x1232  
800 Devillen, Royal Oak, MI 48073  
katherine.abela@royaloakschools.org

The name(s), title(s), and contact information of this/these individual(s) will be published annually on the School District's web site and in the parent/student and staff handbooks.

Building Principals shall serve as Building Section 504/ADA Compliance Officer(s) ("Building Compliance Officers").

The District Compliance Officer(s) are responsible for coordinating the District's efforts to comply with and fulfill its responsibilities under Section 504 and Title II of the ADA. A copy of Section 504 and the ADA, including copies of the implementing regulations, may be obtained from the District Compliance Officer(s).

The District Compliance Officer(s) will oversee the investigation of any complaints of discrimination based on disability, which may be filed pursuant to the Board's adopted internal complaint procedure, and will attempt to resolve such complaints.

The Board will provide for the prompt and equitable resolution of complaints alleging violations of Section 504/ADA. See below. The Board will further establish and implement a system of procedural safeguards in accordance with Section 504, including the right to an impartial due process hearing. See AG 2260.01B.

## **Training**

The District Compliance Officer(s) will also oversee the training of employees in the District so that all employees understand their rights and responsibilities under Section 504 and the ADA, and are informed of the Board's policies, administrative guidelines and practices with respect to fully implementing and complying with the requirements of Section 504/ADA.

The Board will provide in-service training and consultation to staff responsible for the education of persons with disabilities, as necessary and appropriate.

## **Facilities**

No qualified person with a disability will, because the District's facilities are inaccessible to or unusable by persons with disabilities, be denied the benefits of, be excluded from participation in, or otherwise be subjected to discrimination under any program or activity to which Section 504/ADA applies.

For facilities constructed or altered after June 3, 1977, the District will comply with applicable accessibility standards. For those existing facilities constructed prior to June 3, 1977, the District is committed to operating its programs and activities so that they are readily accessible to persons with disabilities. This includes, but is not limited to, providing accommodations to parents with disabilities who desire access to their child's educational program or meetings pertinent thereto. Programs and activities will be designed and scheduled so that the location and nature of the facility or area will not deny a student with a disability the opportunity to participate on the same basis as students without disabilities.

## **Education**

The Board is committed to identifying, evaluating, and providing a free appropriate public education (FAPE) to students within its jurisdiction who have a physical or mental impairment that substantially limits one or more major life activities, regardless of the nature or severity of their disabilities.

An appropriate education may include regular or special education and related aids and services to accommodate the unique needs of students with disabilities. For students with disabilities who are not eligible for specially designed instruction under the IDEA, the special education and related aids and services (including accommodations/modifications/interventions) they need in order to have their needs met as adequately as the needs of nondisabled students are met, shall be delineated, along with their placement, in a Section 504 Plan (Form 2260.01A F13). Parents/guardians/custodians ("parents") are invited and encouraged to participate fully in the evaluation process and development of a Section 504 Plan. The quality of education services provided to students with disabilities will be equal to the quality of services provided to students without disabilities.

The Board is committed to educating (or providing for the education of) each qualified person with a disability who resides within the District with persons who are not disabled to the maximum extent appropriate. Generally, the District will place a person with a disability in the regular educational environment unless it is demonstrated that the education of the person in the regular environment, even with the use of supplementary aids and services cannot be achieved satisfactorily. If the District places a person in a setting other than the regular educational environment, it shall take into account the proximity of the alternate setting to the person's home. If the Board operates a separate class or facility that is identifiable as being for persons with disabilities, the facility, program, and activities and services must be comparable to the facilities, programs, and activities and services offered to students without a disability.

The District will provide non-academic extracurricular services and activities in such a manner as is necessary to afford qualified persons with disabilities an equal opportunity for participation in such services and activities. Non-academic and extracurricular services and activities may include counseling services, physical recreational athletics, transportation, health services, recreational activities, special interests groups or clubs sponsored by the District, referrals to agencies that provide assistance to persons with disabilities, and employment of students. In providing or arranging for the provision of meals and recess periods, and non-academic and extracurricular services and activities, including those listed above, the District will verify that persons with disabilities participate with persons without disabilities in such services and activities to the maximum extent appropriate.

## **Notice**

Notice of the Board's policy on nondiscrimination in education practices and the identity of the District's Compliance Officer(s) will be republished on the District's website and posted throughout the District, and included in the District's recruitment statements or general information publications.

## **Complaint Procedures**

If a person believes that ~~they have s/he~~ has been discriminated against on the basis of ~~his/her~~ disability, the person may utilize the following complaint procedures as a means of reaching, at the lowest possible administrative level, a prompt and equitable resolution of the matter.

In accordance with Section 504 of the Rehabilitation Act of 1973 and its implementing regulations ("Section 504"), parents and students will be notified of their right to file an internal complaint regarding an alleged violation, misinterpretation or misapplication of Section 504. In addition, students and their parents will be notified of their right to file a complaint with the U.S. Department of Education's Office for Civil Rights. Finally, students and parents will be advised of their right to request a due process hearing before an Impartial Hearing Officer (IHO) regarding the identification, evaluation or educational placement of persons with disabilities, including the right to participation by the student's parents or guardian and representation of counsel, and their right to examine relevant education records.

Internal complaints and requests for due process hearings must be put in writing and must identify the specific circumstances or areas of dispute that have given rise to the complaint or the request for a hearing, and offer possible solutions to the dispute. The complaint or request for due process hearing must be filed with a District Compliance Officer within specified time limits. The District's Compliance Officer is available to assist individuals in filing a complaint or request.

Unless expressly stated otherwise, the term "day" or "days" as used in this policy means business day(s) (i.e., a day(s) that the Board office is open for normal operating hours, Monday – Friday, excluding State-recognized holidays).

## **Internal Complaint Procedures**

An internal complaint may be filed by a student and/or parent. A student and/or parent may initiate the internal complaint procedure when ~~the student and/or parents s/he/they~~ believe that a violation, misapplication or misinterpretation of Section 504 has occurred. Additionally, the following procedure may be used for any disagreement with respect to actions regarding the identification, evaluation, or educational program or placement of students who are identified as disabled or believed to be disabled pursuant to Section 504, and are not eligible under the IDEIA, except in the case of disciplinary actions where the provisions of the Student Code of Conduct apply. Use of the internal complaint procedure is not a prerequisite to the pursuit of other remedies, including the filing of a complaint with the U.S. Department of Education's Office for Civil Rights or requesting a due process hearing.

### **Step 1**

Investigation by the Building Compliance Officer: A student or parent may initiate an investigation by filing a written internal complaint with the Building Compliance Officer. The complaint should fully describe the circumstances giving rise to the dispute and how the child is adversely affected. The complaint must be filed as soon as possible, but not longer than thirty (30) days after disclosure of the facts giving rise to the complaint. The Building Compliance Officer shall conduct an impartial investigation of the complaint. As part of the investigation, the Building Compliance Officer shall permit the complainant to present witnesses and other evidence in support of the complaint. The investigation shall be completed within fifteen (15) days of the written complaint being filed. The Building Compliance Officer will notify the complainant in writing of ~~the~~ ~~his/her~~ decision.

### **Step 2**

Appeal to the District Compliance Officer: If the complaint is not resolved satisfactorily at Step 1, the student or parent may appeal the Building Compliance Officer's decision in writing to the District Compliance Officer. The appeal must be made within five (5) days following receipt of the Building Compliance Officer's decision. The District Compliance Officer will review the case, may conduct an informal hearing, and will notify all parties in writing of their his/her decision within ten (10) days of receiving the appeal.

### Step 3

If the complaint is not resolved satisfactorily at Step 2, the student or parent may request a due process hearing, provided the complaint involves an issue related to the identification, evaluation, or placement of the student.

If it is determined that the Complainant was subjected to unlawful discrimination, the Building and District Compliance Officers must identify what corrective action will be taken to stop, remedy, and prevent the recurrence of the discrimination/retaliation. The corrective action should be reasonable, timely, age-appropriate and effective, and tailored to the specific situation.

### OCR Complaint

At any time, if a student or parent believes that the student or parent s/he has been subjected to discrimination based upon his/her disability in violation of Section 504 or the ADA, the individual may file a complaint with the U.S. Department of Education's Office for Civil Rights ("OCR"). The OCR can be reached at:

#### U.S. Department of Education

Office for Civil Rights  
Lyndon Baines Johnson Department of Education Building  
400 Maryland Ave., SW  
Washington, DC 20202-1100  
Telephone: (800) 421-3481  
FAX: (202) 453-6012  
TDD: 800-877-8339  
E-mail: [OCR@ed.gov](mailto:OCR@ed.gov)  
Web: <http://www.ed.gov/ocr>

U.S. Department of Education  
Office for Civil Rights  
Cleveland Office  
1350 Euclid Avenue, Suite 325  
Cleveland, Ohio 44115  
(216) 522-4970  
FAX: (216) 522-2573  
TDD: (216) 522-4944  
E-mail: [OCR.Cleveland@ed.gov](mailto:OCR.Cleveland@ed.gov)  
Web: <http://www.ed.gov/ocr>

Except in extraordinary circumstances, the OCR does not review the result of individual placement and other educational decisions, so long as the District complies with the "process" requirements of Subpart D of Section 504.

### Retaliation

Retaliation against a person who makes a report or files a complaint alleging unlawful discrimination/retaliation or participates as a witness in an investigation is prohibited. Neither the Board nor any other person may intimidate, threaten, coerce or interfere with any individual because the person opposed any act or practice made unlawful by Section 504 or the ADA, or because that individual made a report, formal complaint, testified, assisted or participated or refused to participate in any manner in an investigation, proceeding, or hearing under those laws and/or this policy, or because that individual exercised, enjoyed, aided or encouraged any other person in the exercise or enjoyment of any right granted or protected by those laws and/or this policy.

Retaliation against a person for making a report of discrimination, filing a formal complaint, or participating in an investigation or meeting is a serious violation of this policy that can result in imposition of disciplinary sanctions/consequences and/or other appropriate remedies.

Formal complaints alleging retaliation may be filed according to the internal complaint process set forth above.

The exercise of rights protected under the First Amendment of the United States Constitution does not constitute retaliation prohibited under this policy.

Revised 7/10/14  
Revised 8/13/15  
Revised 6/10/21  
Revised 12/8/22  
T.C. 3/27/23

Legal

29 U.S.C. 794, Section 504 Rehabilitation Act of 1973, as amended

34 C.F.R. Part 104

42 U.S.C. 12101 et seq., Americans with Disabilities Act of 1990, as amended

**Last Modified by Jennifer Perkins on March 17, 2026**

Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Vol. 40, No. 1 - Nondiscrimination - September 2025 Rescind NONDISCRIMINATION BASED ON GENETIC INFORMATION OF THE EMPLOYEE
Code	po1422.02
Status	
Adopted	September 13, 2012

### **Rescind Policy - Vol. 40, No. 1**

#### **~~1422.02 — NONDISCRIMINATION BASED ON GENETIC INFORMATION OF THE EMPLOYEE~~**

~~The Board of Education prohibits discrimination on the basis of genetic information in all aspects of employment, including hiring, firing, compensation, job assignments, promotions, layoffs, training, fringe benefits, or any other terms, conditions, or privileges of employment. The Board also does not limit, segregate, or classify employees in any way that would deprive or tend to deprive them of employment opportunities or otherwise adversely affect the status of an employee as an employee, based on genetic information. Harassment of a person because of his/her genetic information is also prohibited. Likewise, retaliation against an applicant or employee for engaging in protected activity is prohibited.~~

~~In accordance with the Genetic Information Nondiscrimination Act ("GINA"), the Board shall not request, require, or purchase genetic information of employees, their family members, or applicants for employment. Further, in compliance with this Act, employees are directed not to provide any genetic information, including the individual's family medical history, in response to necessary requests for medical information, with the exception that family medical history may be acquired as part of the certification process for FMLA leave when an employee is asking for leave to care for an immediate family member with a serious health condition. Applicants for employment are directed not to provide any genetic information, including the individual's family medical history, in response to requests for medical information as part of the District's application process.~~

~~[ ] The District recognizes that genetic information may be acquired through commercially and publicly available documents like newspapers, books, magazines, periodicals, television shows, or the Internet. The District prohibits, however, its employees from searching such sources with the intent of finding or obtaining genetic information or accessing sources from which they are likely to acquire genetic information.~~

~~"Genetic information," as defined by GINA, means information about: (a) an individual's genetic tests; (b) the genetic tests of that individual's family members; (c) the manifestation of disease or disorder in family members of the individual (i.e., family medical history); (d) an individual's request for, or receipt of, genetic services, or the participation in clinical research that includes genetic services by the individual or a family member of the individual; or (e) the genetic information of a fetus carried by an individual or a pregnant woman who is a family member of the individual and the genetic information of an embryo legally held by an individual or family member using assistive reproductive technology.~~

~~If the District either legally and/or inadvertently receives genetic information about an employee or applicant for employment from the employee, applicant for employment, or a medical provider, it shall be treated as a confidential medical record in accordance with law.~~

~~The Superintendent shall appoint a compliance officer who shall be responsible for overseeing the District's compliance with Federal regulations and promptly dealing with any inquiries or complaints. S/He shall also verify that proper notice of nondiscrimination for Title II of the Genetic Information Nondiscrimination Act of 2008 is provided to staff members and that all District requests for health related information (e.g., to support an employee's request for reasonable accommodation under the ADA or a request for sick leave) is accompanied by a written warning that directs the employee or health care provider not to collect or provide genetic information.~~

~~The warning shall read as follows:~~



Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Vol. 40, No. 1 - Nondiscrimination - September 2025 Replacement NONDISCRIMINATION, EQUAL EMPLOYMENT OPPORTUNITY, AND ANTI-HARASSMENT
Code	po1422
Status	1st Reading
Adopted	March 14, 2013
Last Revised	March 27, 2023
Last Reviewed	March 13, 2026

### **Replacement Policy - Vol. 40, No. 1**

#### **1422 - NONDISCRIMINATION, EQUAL EMPLOYMENT OPPORTUNITY, AND ANTI-HARASSMENT**

The Board of Education does not discriminate on the basis of race, color, national origin, sex (including pregnancy, childbirth, and related medical conditions; sexual orientation; and gender identity), disability, age, religion, height, weight, marital or family status, military status, ancestry, genetic information, or any other legally protected category (collectively, Protected Classes) in its programs and activities, including employment opportunities.

The Board is committed to providing a work environment that is free from Prohibited Conduct, responding promptly and effectively when it has knowledge of conduct that reasonably may constitute Prohibited Conduct, and addressing Prohibited Conduct in its education programs or activities. This commitment applies to all District operations and this policy applies to Prohibited Conduct occurring within or as a part of the District's education programs and activities, whether on school property or at another location during an activity sponsored by the Board.

Persons who commit Prohibited Conduct are subject to the full range of disciplinary sanctions set forth in this policy.

The Board will provide persons who have experienced Prohibited Conduct with ongoing remedies as reasonably necessary to restore or preserve access to the District's education programs or activities.

All school employees share responsibility for avoiding, discouraging, and reporting any form of Prohibited Conduct.

The Board will take immediate action to address the following prohibited acts:

- A. Retaliating against a person who has made a report or filed a complaint alleging Prohibited Conduct, or has participated in the below-described grievance procedures.
- B. Filing a malicious or knowingly false report or complaint of Prohibited Conduct.
- C. Disregarding, failing to appropriately address, or delaying action to appropriately address allegations of Prohibited Conduct when responsibility for reporting and/or investigating such charges comprises part of one's administrative/supervisory duties.

#### **Definitions:**

Words used in this policy shall have those meanings defined herein; words not defined herein shall be construed according to their plain and ordinary meanings.

**Bullying** means: any unwanted and repeated written, verbal, or physical behavior, including any threatening, insulting, or dehumanizing gesture, by an adult, that is sufficiently severe or pervasive to create an intimidating, hostile, or offensive work environment; or unreasonably interfere with the individual's work performance or participation. It may involve: (a) threats; (b) intimidation; (c) stalking; (d) cyberstalking; (e) cyberbullying; (f) physical violence; (g) theft; (h) sexual, religious, or racial harassment; (i) public humiliation; or (j) destruction of property. Bullying rises to the level of unlawful harassment when one (1) or

more persons systematically and chronically inflict physical hurt or psychological distress on one (1) or more employees, and that bullying is based upon one (1) or more Protected Classes, that is, characteristics that are protected by Federal and/or State civil rights laws. Ordinary teasing, horseplay, arguments, and peer conflict do not constitute bullying for purposes of this policy.

**Complainant** means: an employee who is alleged to have been subjected to conduct that could constitute Prohibited Conduct; or a person, other than an employee, who is alleged to have been subjected to conduct that could constitute Prohibited Conduct and who was participating or attempting to participate in the District's education programs or activities at the time of the alleged Prohibited Conduct.

**Complaint** means: an oral or written request to the District that objectively can be understood as a request for the District to investigate and make a determination about alleged Prohibited Conduct.

**Day(s)**: Unless expressly stated otherwise, the term "day" or "days" as used in this policy means business day(s) (i.e., days that the Board office is open for normal operating hours, Monday – Friday, excluding State-recognized holidays).

**Disciplinary sanctions** means: consequences imposed on a respondent following a determination that the respondent engaged in Prohibited Conduct.

**Education programs or activities** refer to: all the District's operations including, but not limited to, in-person and online/remote educational instruction, employment, extracurricular activities, athletics, performances, and community engagement and outreach programs. The term applies to all programs and activities operated by the Board on school grounds or on other property owned or occupied by the Board. It also includes events and circumstances that take place off school property/grounds but over which the District asserts disciplinary authority (e.g., at off-campus activities sponsored by the Board).

**Exculpatory evidence** means: evidence that is favorable to a respondent because it helps excuse, justify, or absolve a respondent of alleged wrongdoing and tends to establish that a respondent did not engage in Prohibited Conduct.

**Genetic information** means: information about: (a) an individual's genetic tests; (b) the genetic tests of that individual's family members; (c) the manifestation of disease or disorder in family members of the individual (i.e., family medical history); (d) an individual's request for, or receipt of, genetic services, or the participation in clinical research that includes genetic services by the individual or a family member of the individual; or (e) the genetic information of a fetus carried by an individual or a pregnant woman who is a family member of the individual and the genetic information of an embryo legally held by an individual or family member using assistive reproductive technology.

**Harassment** means: any threatening, insulting, or dehumanizing gesture, use of technology, or written, verbal, or physical conduct directed against an employee that (a) places the employee in reasonable fear of harm to their person or damage to their property; (b) has the effect of substantially interfering with the employee's work performance; or (c) has the effect of substantially disrupting the orderly operation of a school. Each of the following types of harassment involves unwelcome physical, verbal, or nonverbal conduct that is based upon an individual's protected characteristic(s) and has the purpose or effect of interfering with the individual's work performance or creating an intimidating, hostile, or offensive work environment.

- A. **Age Harassment** means: harassment based on negative perceptions about older workers. It also includes harassment based on stereotypes about older workers, even if they are not motivated by animus, such as pressuring an older employee to transfer to a job that is less technology-focused because of the perception that older workers are not well-suited to such work or encouraging an older employee to retire.
- B. **Disability Harassment** means: harassment based upon a person's disability and includes harassment based upon stereotypes about individuals with disabilities in general or about an individual's particular disability. It also includes harassment based on traits or characteristics linked to an individual's disability, such as how the person speaks, looks, or moves. For example, negative comments about an individual's speech patterns, movement, physical impairments, or defects/appearances, or the like. Disability-based harassment includes: (a) harassment because an individual requests or receives reasonable accommodation; (b) harassment because an individual is regarded as having an impairment, even if the individual does not have an actual disability, or a record of disability; (c) harassment because an individual has a record of a disability, even if the individual currently does not have a disability; and (d) harassment based on the disability of an individual with whom the employee is associated. Finally, disability-based harassment may occur where conduct is directed at or pertains to a person's genetic information.
- C. **National Origin/Ancestry Harassment** means: harassment due to a person's (or their ancestor's) place of origin. Such harassing conduct can include ethnic slurs or epithets, derogatory comments about individuals of a particular nationality, and use of stereotypes about a person's national origin. Additionally, it can include harassment regarding traits or characteristics linked to an individual's national origin, such as physical characteristics, ethnic or cultural characteristics or customs (e.g., surnames, attire, or diet), or linguistic characteristics (e.g., a person's manner of speaking, non-English language accent, or a lack of fluency in English).
- D. **Race/Color Harassment** means: unwelcome physical, verbal, or nonverbal conduct that is based upon an individual's race or color and has the purpose or effect of interfering with the individual's work performance; or creating an intimidating, hostile, or offensive work environment. Such harassment may occur where conduct is directed at the characteristics of a person's race or color, such as racial slurs, nicknames implying stereotypes, epithets, and/or negative references relative to racial customs.

E. **Religious (Creed) Harassment** means: harassment based on a person's surname, religion (including atheism or lack of religious belief), religious traditions and practices, or religious dress/clothing, and includes making offensive comments about the same. It also includes religious slurs or epithets, harassing conduct based on religious stereotypes, and harassment associated with a person's request for and/or receipt of religious accommodation. Religious harassment also involves explicitly or implicitly coercing an employee to engage in religious practices at work.

F. **Sexual Harassment** means (for purposes of this policy and consistent with Title VII of the Civil Rights Act of 1964): unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when: (a) submission to such conduct is made either implicitly or explicitly a term or condition of an individual's employment; (b) submission or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual; or (c) such conduct has the purpose or effect of interfering with the individual's work performance; or creating an intimidating, hostile, or offensive working environment. Sexual harassment may involve the behavior of a person of any gender against a person of the same or another gender.

1. Sexual Harassment covered by Policy 2266 - Nondiscrimination on the Basis of Sex in Education Programs or Activities is not included in this policy. Allegations of such conduct shall be addressed solely by Policy 2266.
2. Prohibited acts that constitute sexual harassment under this policy may take a variety of forms. Examples of the kinds of conduct that may constitute sexual harassment include, but are not limited to:
  - a. Conduct of a sexualized nature, such as unwanted conduct expressing sexual attraction or involving sexual activity (e.g., unwelcome sexual propositions, invitations, solicitations, and flirtations; unwanted physical and/or sexual contact, including unwelcome and inappropriate touching, patting, or pinching **( X )**; and obscene gestures **[END OF OPTION]**.
  - b. Sexual attention or sexual coercion, such as demands or pressure for sexual favors (e.g., threats or insinuations that a person's employment, wages, or other conditions of employment may be adversely affected by not submitting to sexual advances; giving unwelcome personal gifts such as lingerie that suggest the desire for a romantic relationship; leering or staring at someone in a sexual way, such as staring at a person's breasts, buttocks, or groin).
  - c. Rape, sexual assault, or other acts of sexual violence.
  - d. Discussing or displaying visual depictions of sex acts or sexual remarks (e.g., unwelcome verbal expressions of a sexual nature, including graphic sexual commentaries about a person's body, dress, appearance, or sexual activities; the unwelcome use of sexually degrading language, profanity, jokes or innuendoes; unwelcome suggestive or insulting sounds or whistles; obscene telephone calls, texts, etc.; sexually suggestive objects, pictures, graffiti, videos, posters, audio recordings or literature placed in the work environment; asking or telling about sexual fantasies, sexual preferences, or sexual activities; speculations about a person's sexual activities or sexual history, or remarks about one's own sexual activities or sexual history).
  - e. A consensual sexual relationship where such relationship leads to favoritism of a subordinate employee with whom the superior is sexually involved and where such favoritism adversely affects other employees or otherwise creates a hostile work environment.
  - f. Verbal, nonverbal, or physical aggression, intimidation, or hostility based on sex or sex-stereotyping that does not involve conduct of a sexual nature.
  - g. Non-sexual conduct based on sex, such as sex-based epithets; sexist comments (such as remarks that women do not belong in management or that men do not belong in the nursing profession); or facially sex-neutral offensive conduct motivated by sex (such as bullying directed toward employees of one sex).
  - h. Harassment based on pregnancy, childbirth, or related medical condition, which may include issues pertaining to lactation, using or not using contraception, or deciding whether to have, or not to have, an abortion.

Not all behavior with sexual connotations constitutes unlawful sexual harassment. Sex-based or gender-based conduct must be objectively offensive (a reasonable person would find it hostile or abusive), subjectively offensive (the complainant actually perceived it as abusive), and either sufficiently severe (a single extremely serious incident) or pervasive (a pattern of behavior), such that it adversely affects, limits, or denies an individual's employment, or creates a hostile or abusive employment environment.

**Inculpatory evidence** means: evidence that links a respondent to alleged wrongdoing and tends to establish a respondent engaged in Prohibited Conduct (i.e., has culpability).

**Military status** means: a person's past, current, or future membership, service, or obligation in a uniformed service (e.g., Army, Marine Corps, Navy, Air Force, Space Force, Coast Guard, Public Health Service Commissioned Corps, and National Oceanic and Atmospheric Administration Commissioned Officer Corps). Service in the uniformed services also means the performance of duty, on a voluntary basis, or involuntary basis, in a uniformed service, under competent authority, and includes active duty, active duty for training, initial active duty for training, inactive duty for training, and full-time National Guard duty. It further includes the period of time for which a person is absent from employment for the purpose of an examination to determine the fitness of the person to perform any such duty as listed above.

**Party** means: a complainant or respondent.

**Pregnancy, childbirth, or related medical conditions** means:

- A. "Pregnancy" and "childbirth" refer to the pregnancy or childbirth of a specific employee and include, but are not limited to, current pregnancy; past pregnancy; potential or intended pregnancy (which can include infertility, fertility treatment, and the use of contraception); labor; and childbirth (including vaginal and cesarean delivery).
- B. "Related medical conditions" are medical conditions relating to the pregnancy or childbirth of a specific employee, and may include termination of pregnancy, including via miscarriage, stillbirth, or abortion; ectopic pregnancy; preterm labor; pelvic prolapse; nerve injuries; cesarean or perineal wound infection; maternal cardiometabolic disease; gestational diabetes; preeclampsia; HELLP (hemolysis, elevated liver enzymes and low platelets) syndrome; hyperemesis gravidarum; anemia; endometriosis; sciatica; lumbar lordosis; carpal tunnel syndrome; chronic migraines; dehydration; hemorrhoids; nausea or vomiting; edema of the legs, ankles, feet, or fingers; high blood pressure; infection; antenatal (during pregnancy) anxiety, depression, or psychosis; postpartum depression, anxiety, or psychosis; frequent urination; incontinence; loss of balance; vision changes; varicose veins; changes in hormone levels; vaginal bleeding; menstruation; and lactation and conditions related to lactation, such as low milk supply, engorgement, plugged ducts, mastitis, or fungal infections. The preceding list of related medical conditions is not exhaustive.

**Prohibited Conduct** means: unlawful discrimination or harassment based on a person's Protected Class(es) or retaliation. Such misconduct involves a violation of Federal and/or State civil rights laws.

**Relevant** means: related to the allegations of Prohibited Conduct under investigation as part of the Board's grievance procedures. Questions are relevant when they seek evidence that may aid in showing whether the alleged Prohibited Conduct occurred, and evidence is relevant when it may aid a decisionmaker in determining whether the alleged Prohibited Conduct occurred.

**Remedies** means: measures provided, as appropriate, to a complainant or any other person the District identifies as having had their equal access to the District's education programs or activities limited or denied by Prohibited Conduct. These measures are provided to restore or preserve that person's access to the District's education program or activity after the District determines that Prohibited Conduct occurred.

**Respondent** means: a person who is alleged to have engaged in Prohibited Conduct.

**Retaliation** means: intimidation, threats, coercion, or discrimination against any person by the District, a student, a Board employee, or any other person authorized by the Board to provide aid, benefit, or service under the District's education programs or activities, for the purpose of interfering with any right or privilege secured by Federal or State law, or because the person has reported information, made a complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing under applicable Federal or State laws or regulations.

**School District community** means: students and Board employees (i.e., administrators and professional and classified staff), as well as Board members, agents, volunteers, contractors, or other persons subject to the control and supervision of the Board.

**Supportive measures** means: non-disciplinary, non-punitive individualized services offered as appropriate, as reasonably available, without fee or charge to the complainant or the respondent before or after making a report or filing a complaint. Such measures are designed to restore or preserve that party's access to the District's education programs or activities without unreasonably burdening the other party, including measures designed to protect the safety of all parties or the District's educational environment or deter Prohibited Conduct. Supportive measures may include modifications of work schedules, mutual restrictions of contact between the parties, changes in work locations, leaves of absence, increased security and monitoring of certain work settings; training related to Prohibited Conduct, **[x]** referral to Employee Assistance Program, **[END OF OPTION]** and other similar measures.

**Third Parties** means: guests and/or visitors on District property (e.g., visiting speakers, participants on opposing athletic teams, parents), vendors doing business with, or seeking to do business with, the Board, and other individuals who come in contact with members of the School District community at school-related events/activities (whether on or off District property).

### **Pregnancy, Childbirth, and Related Medical Conditions**

The Board will not discriminate against an employee based on the person's current pregnancy, potential or intent to become pregnant, past pregnancy, or medical condition related to pregnancy or childbirth, or because the person uses birth control, or has had or not had an abortion.

Additionally, the Board will provide a reasonable accommodation to an employee's known limitation related to pregnancy, childbirth, or a related medical condition, unless the accommodation will cause the District undue hardship.

The Board will treat pregnancy, childbirth, and related medical conditions as any other temporary medical conditions for all job-related purposes, including commencement, duration, and extensions of leave; accrual of seniority and any other benefit or service; reinstatement; and under any fringe benefit offered to employees by virtue of employment.

The Board will provide reasonable break time for an employee to express breast milk while at work for the first year after the

employee's child's birth. The Board will provide the employee with a space, other than as a bathroom, that is clean, bright and free from intrusion from coworkers and the public, and which the employee can use as needed to express breast milk. See Board Policy 6700 – Fair Labor Standards Act.

## **Nondiscrimination Based on Employee's Genetic Information**

The Board prohibits discrimination on the basis of genetic information in all aspects of employment, including hiring, firing, compensation, job assignments, promotions, layoffs, training, fringe benefits, or any other terms, conditions, or privileges of employment. The Board also does not limit, segregate, or classify employees in any way that would deprive or tend to deprive them of employment opportunities or otherwise adversely affect the status of an employee as an employee, based on genetic information. Harassment of a person because of the individual's genetic information is also prohibited. Likewise, retaliation against an applicant or employee for engaging in protected activity is prohibited.

In accordance with the Genetic Information Nondiscrimination Act ("GINA"), the Board shall not request, require, or purchase genetic information of employees, their family members, or applicants for employment. Further, in compliance with GINA, employees are directed not to provide any genetic information, including the individual's family medical history, in response to necessary requests for medical information, with the exception that family medical history may be acquired as part of the certification process for FMLA leave, when an employee is asking for leave to care for an immediate family member with a serious health condition. Applicants for employment are directed not to provide any genetic information, including the individual's family medical history, in response to requests for medical information as part of the District's application process.

~~[ ] The District recognizes that genetic information may be acquired through commercially and publicly available documents like newspapers, books, magazines, periodicals, television shows, or the Internet. The District prohibits, however, its employees from searching such sources with the intent of finding or obtaining genetic information or accessing sources from which they are likely to acquire genetic information. [END OF OPTION]~~

If the District either legally and/or inadvertently receives genetic information about an employee or applicant for employment from the employee, applicant for employment, or a medical provider, it shall be treated as a confidential medical record in accordance with law.

The District Compliance Officer (see below) shall be responsible for overseeing the District's compliance with applicable Federal regulations and promptly dealing with any inquiries or complaints. The District Compliance Officer or designee shall also verify that proper notice of nondiscrimination for Title II of the Genetic Information Nondiscrimination Act of 2008 is provided to staff members, and that all District requests for health-related information (e.g., to support an employee's request for reasonable accommodation under the Americans with Disabilities Act ("ADA") or a request for sick leave) is accompanied by a written warning that directs the employee or health care provider not to collect or provide genetic information. The warning shall read as follows:

The Genetic Information Nondiscrimination Act of 2008 ("GINA") prohibits employers and other entities covered by GINA Title II, including the Board of Education, from requesting or requiring genetic information of an individual or family member of the individual, except as specifically allowed by law. To comply with this law, do not provide any genetic information when responding to this request for medical information (unless the request pertains to a request for FMLA leave for purposes of caring for an immediate family member with a serious health condition). "Genetic information," as defined by GINA, includes an individual's family medical history, the results of an individual's or family member's genetic test, the fact that an individual or an individual's family member sought or received genetic services or participated in clinical research that includes genetic services, and genetic information of a fetus carried by an individual or an individual's family member or an embryo lawfully held by an individual or family member receiving assistive reproductive services.

~~[ ] The District offers health services ( ), including a wellness program [END OF INTERNAL OPTION]. Participation in the services/program is voluntary. Genetic information (such as family medical history) may be obtained as part of an individual's participation in the service/program. If that occurs, individual genetic information may be provided to the individual receiving the services and to the person's health services providers, but only genetic information in aggregate form will be provided to the Board. [END OF OPTION]~~

### **District Compliance Officer(s)**

#### **[DRAFTING NOTES:**

- 1. Neola suggests the Board appoint both a male and a female to serve as the District Compliance Officers. By appointing two (2) District Compliance Officers, there should always be a District Compliance Officer available to address a claim that pertains to the other District Compliance Officer. If, however, the Board appoints more than one (1) District Compliance Officer, Neola recommends that it designate one (1) of the District Compliance Officers to retain ultimate oversight over the assigned responsibilities and ensure the Board's consistent compliance with its responsibilities under applicable Federal and State laws that prohibit unlawful discrimination/harassment based on protected classes and retaliation. Alternatively, the Board could appoint a District Compliance Officer and one (1) or more persons to assist the District Compliance Officer with performance of the responsibilities identified in this policy and its accompanying administrative guidelines. Often the person(s) designated to assist a District Compliance Officer is/are called Deputy or Assistant Compliance Officer(s). If the Board elects this alternative approach, it would designate a District Compliance Officer for purposes of this policy, and then designate the other position(s) through its AG. The person(s) in the alternative support role(s) will need to be trained in the same manner as the District Compliance Officer (see**

2. The Board must list in this policy either the Name(s) or Title(s) of the District Compliance Officer(s); while the Board may list both the Name(s) and Title(s), Neola suggests that the Board only list the Title(s) in this policy (so the Board does not need to revise/amend the policy whenever there is a change in the actual person(s) holding the designated position(s)), but list both the Name(s) and Title(s) in the requisite notices/postings (e.g., website) and publications (e.g., handbooks). The District will also need to decide whether to list the Name(s) and Title(s), or just the Title(s), in Administrative Guideline 1422 if the District elects to identify the District Compliance Officer in the AG (see DRAFTING NOTE in the AG; again, if the District lists the Name(s) and Title(s), it will need to remember to update the AG whenever there is a change in the actual person(s) holding the designated position(s). No matter what, the Board will need to amend its policy and update its AG, requisite notices/postings, and publications, whenever it changes the Title of the position(s) designated to serve as the District Compliance Officer(s).

3. Reminder: Whenever a new person begins to serve as the District Compliance Officer (or in a support role to the District Compliance Officer), the District needs to make sure the new person is appropriately trained, in a timely manner, to fulfill the responsibilities of the position to which the person is assigned.]

**[END OF DRAFTING NOTES]**

The Board designates and authorizes the following individual(s) to coordinate its efforts to comply with the Board’s responsibilities under Federal and State laws that prohibit discrimination, including harassment, based on Protected Classes and retaliation (also known as “Civil Rights Coordinator(s)” or “Anti-Harassment Compliance Officer(s)”) (hereinafter referred to as the “District Compliance Officer(s)” or “CO(s)”):

\_\_\_\_\_  
\_\_\_\_\_  
{Name and/or School District Title}  
\_\_\_\_\_  
\_\_\_\_\_  
{Office Address}  
\_\_\_\_\_  
\_\_\_\_\_  
{Email Address}  
\_\_\_\_\_  
\_\_\_\_\_  
{Telephone Number}

Patrick Wolynski  
Executive Director Staff & Student Services  
248-435-8400 x1211  
800 Devillen, Royal Oak, MI 48073  
patrick.wolynski@royaloakschools.org

**[DRAFTING NOTE: The District may want to create a static (i.e., fixed) District Compliance Officer -specific email address and phone number that will not change when the person(s) and/or position(s) designated to be the CO(s) change(s) – e.g., CO4CivilRights@(insert District’s domain) – which the Technology Director/Department can program to be forwarded to the actual individual(s) serving as the District Compliance Officer(s) at any given time. Likewise, the District may want to establish a static Telephone Number for the position of District Compliance Officer that can be forwarded to, and accessed by, the actual person(s) serving in the CO position(s) at any given time. These two (2) steps will help reduce the information that needs to be updated in policy, AG, and/or the requisite notices/postings and publications when changes occur to the specific person(s)/position(s) designated to serve as the CO(s).]**

**[DRAFTING NOTE: Complete the following information if the Board appoints more than one (1) District Compliance Officer.]**

**[ x ] [DESIGNATION OF A SECOND DISTRICT COMPLIANCE OFFICER]**

\_\_\_\_\_  
\_\_\_\_\_  
{Name and/or School District Title}  
\_\_\_\_\_  
\_\_\_\_\_  
{Office Address}  
\_\_\_\_\_  
\_\_\_\_\_  
{Email Address}  
\_\_\_\_\_  
\_\_\_\_\_  
{Telephone Number}

Katherine Abela  
Executive Director Finance and Facilities  
248-435-8400 x1232

**[END OF OPTION]**

**[DRAFTING NOTE: As discussed above, if the Board designates more than one (1) CO, Neola recommends that the District select the following option.]**

The Board designates Patrick Wolynski, Executive Director Staff & Student Services **[DRAFTING NOTE: Insert Name and/or Title of the District Compliance Officer who is ultimately responsible for the District's compliance with its responsibilities under Federal and State laws that prohibit discrimination/harassment based on Protected Classes and retaliation as the individual who is ultimately responsible for oversight over the Board's compliance with applicable Federal and State laws and regulations that prohibit discrimination based on the basis of Protected Classes and retaliation. [END OF OPTION]**

~~The District Compliance Officer may delegate specific duties to one (1) or more designees. [END OF OPTION]~~

~~The contact information concerning the District Compliance Officer(s) will be published on the School District's website ( ) and annually [END OF OPTION]:~~

- ~~A. ( ) in parent/student and staff handbooks.~~
- ~~B. ( ) in the School District Annual Report to the public.~~
- ~~C. ( ) on each individual school's website.~~
- ~~D. ( ) in the School District's calendar.~~
- ~~E. ( ) \_\_\_\_\_.~~

**[DRAFTING NOTE: The Board may want to select the following option when the Superintendent is not the CO. While Neola recognizes that this may not always be possible, it may be preferable to have the CO be someone other than the Superintendent because then – if the CO serves as the investigator and decisionmaker – the Superintendent can serve as the appeal decisionmaker or the facilitator for the informal resolution process.]**

The District Compliance Officer(s) shall report directly to the Superintendent except when the Superintendent is a party to a complaint (i.e., either the complainant or the respondent). Under such circumstances, the CO(s) shall report directly to **[SELECT ONE OF THE FOLLOWING]** ( ) the Board President  the Board's Legal Counsel ( ) \_\_\_\_\_ **[OTHER] [END OF INTERNAL OPTIONS]** until the matter in which the Superintendent is a party is concluded. **[END OF OPTION]**

Questions about this policy  and AG 1422 **[END OF OPTION]** should be directed to the District Compliance Officer(s).

The CO(s) is/are responsible for coordinating the District's efforts to comply with applicable Federal and State laws and regulations, including the District's duty to address in a prompt and equitable manner any inquiries or complaints regarding discrimination, harassment, retaliation, or denial of equal opportunity/access. The CO(s) shall also verify that proper notice of nondiscrimination for Title II of the Americans with Disabilities Act (as amended), Title VI and Title VII of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973 (as amended), Genetic Information Nondiscrimination Act (GINA), and the Age Discrimination in Employment Act of 1975 is provided to staff members and the general public.  ~~Any sections of the District's collective bargaining agreements dealing with hiring, promotion, demotion, discipline, and tenure need to contain a statement of nondiscrimination similar to that in the Board's statement set forth above. [END OF OPTION]  In addition, as practical, gender specific terms should be eliminated from such contracts. [END OF OPTION] Copies of the laws and regulations listed above are available upon request from the CO(s).~~

The CO(s) will be available during regular work hours to discuss concerns related to Prohibited Conduct, to assist employees, other members of the District community, and third parties who seek support or advice when informing another individual about Prohibited Conduct, including unwelcome conduct, or to intercede informally on behalf of the individual in those instances where concerns have not resulted in the filing of a formal complaint and where all parties are in agreement to participate in an informal process.

The CO(s) shall monitor the District's education programs and activities for barriers to reporting information about conduct that reasonably may constitute Prohibited Conduct pursuant to Federal and/or State laws that prohibit discrimination/harassment based on the basis of a Protected Class/Category and retaliation, and take steps reasonably calculated to address such barriers.

**Notice of Nondiscrimination**

The Superintendent shall provide a notice of nondiscrimination to students, parents, guardians, or other authorized legal representatives of elementary and secondary students; employees; applicants for admission and employment; and all unions and professional organizations holding collective bargaining or professional agreements with the Board. Specifically, the Superintendent shall post the notice of nondiscrimination on the District's website and in each handbook, catalog, announcement, bulletin, and

application form that it makes available to the persons listed above, or which are otherwise used in connection with the recruitment of employees.  See AG 1422 and Form 1422F1 – Notice and Statement of Nondiscrimination. **[END OF OPTION]**

## **NOTIFICATION/REPORTS OF PROHIBITED CONDUCT**

Any person may provide information to the CO(s) concerning conduct that reasonably may constitute Prohibited Conduct. Such information may be submitted in person, by mail, by telephone, or by electronic mail using the CO's(s') published contact information, or by any other means (oral or written) that results in the CO(s) receiving the information. Information may be provided at any time (including during non-work hours).  Anonymous reports may be submitted using  the online reporting form posted at \_\_\_\_\_ **[insert the web address for the reporting form, or insert a hyperlink tied to the phrase "online reporting form"]**  the hotline reporting number ( \_\_\_\_\_ **[insert phone number]**). **[END OF OPTION]**

All Board employees are required to notify the CO(s) of conduct that reasonably may constitute Prohibited Conduct. For the Board to fulfill its responsibilities under applicable Federal and/or State laws, if a Board employee has knowledge of conduct that reasonably may constitute Prohibited Conduct, the Board employee must notify the/a CO within two (2) **business** days of learning the information or receiving the report. **[DRAFTING NOTE: The applicable statutes and regulations do not specify within how many days the Board employee must notify the CO of receiving notification/a report of Prohibited Conduct; Neola suggests "two (2) days". Alternatively, the Board could make this language more open-ended – e.g., "\*\* \* \* must immediately/promptly notify the/a CO of such information or report."]** The Board employee must also comply with mandatory reporting responsibilities pursuant to Policy 8462 – Student Abuse and Neglect, if applicable. If the Board employee's knowledge about the alleged Prohibited Conduct is based on another individual bringing the information to the Board employee's attention, and the reporting individual submitted a written notification/report or complaint to the Board employee, the Board employee must provide the written notification/report or complaint to the CO.

Notification can be provided orally or in writing and should be as specific as possible. The person making the notification/report should, to the extent known, identify the alleged victim(s), perpetrator(s), and witness(es), and describe in detail what occurred, including date(s), time(s), and location(s).

If a notification/report or complaint involves allegations of Prohibited Conduct by or involving the CO, the person making the report (i.e., providing the notification or filing the complaint) should submit it to the Superintendent or another Board employee who, in turn, will notify the Superintendent of the report/complaint. The Superintendent will then serve in place of the CO for purposes of addressing that report of Prohibited Conduct. **[DRAFTING NOTE: If the Superintendent is the CO, substitute "Board President" in place of "Superintendent."]**

When a Board employee notifies the CO of suspected Prohibited Conduct, the employee is required to report all known details about the alleged Prohibited Conduct including: (1) the name of the alleged respondent(s); (2) the person who experienced the alleged Prohibited Conduct (i.e., the complainant); (3) other persons involved in the alleged Prohibited Conduct (e.g., witnesses); and (4) any other relevant facts, such as date, time, and location. Failure to provide such notification may result in discipline, up to and including suspension or termination of employment.

Any allegations of misconduct not involving Prohibited Conduct as defined in this policy will be addressed through the procedures outlined in other Board policies  and/or administrative guidelines **[END OF OPTION]**, the applicable Student Code of Conduct, applicable collective bargaining agreement, and/or Employee/Administrator Handbook.

When a notification/report or complaint of Prohibited Conduct is made, the CO shall promptly (i.e., within two (2) **business** days **[DRAFTING NOTE: The applicable laws and/or regulations do not define "promptly" or otherwise specify within how many days the contact has to be made; Neola suggests "two (2) days."]** of the CO's receipt of the notification/report or complaint of Prohibited Conduct) contact the purported complainant to discuss the availability of supportive measures, consider the complainant's wishes with respect to supportive measures, inform the complainant of the availability of supportive measures with or without the filing of a complaint, and explain to the complainant the process for filing a complaint. The CO is responsible for coordinating the effective implementation of supportive measures. Any supportive measures provided to the complainant or respondent shall be maintained as confidential, to the extent that maintaining such confidentiality will not impair the ability of the District to provide the supportive measures.

## **GRIEVANCE PROCEDURES**

### **Overview:**

The Board adopts the following grievance procedures to provide for the prompt, effective, and equitable resolution of complaints made by employees, applicants, or other individuals who are participating or attempting to participate in the District's education programs or activities (i.e., members of the School District community and Third Parties), or by the CO alleging any act of Prohibited Conduct.

These grievance procedures shall be used for all complaints of Prohibited Conduct unless it involves conduct involving a student, in which case the grievance procedures set forth in Policy 2260 or Policy 5517.01 shall apply. These grievance procedures set forth the means for investigating and resolving claims involving such Prohibited Conduct; in particular, the procedures provide a method for assessing – in a prompt, effective, and equitable manner – whether an applicable Federal or State law was violated and, if it was, how best to end the Prohibited Conduct, prevent its recurrence, and remedy its effects.

Due to the sensitivity of complaints of Prohibited Conduct, timelines are flexible for initiating the grievance procedures; however, individuals are encouraged to file a complaint within thirty (30) days after the conduct occurs. Once the formal complaint process is begun, the investigation will be completed in a timely manner.

**[DRAFTING NOTE: Title VII of the Civil Rights Act of 1964 ("Title VII") prohibits discrimination in employment. Specifically, it prohibits employment discrimination based on race, color, religion, sex, or national origin, and applies to employers with fifteen (15) or more employees. Title IX, on the other hand, specifically prohibits discrimination based on sex in education programs and activities that receive Federal financial assistance, including employment within those institutions. Title IX is addressed by Board Policy 2266 and AG 2266. While both laws aim to prevent sex-based discrimination in the workplace, Title VII applies more broadly to various types of employers, whereas Title IX is limited to educational institutions receiving Federal funds. Ultimately, both laws aim to ensure equal employment opportunities and protect individuals from discrimination. When a District Compliance Officer receives a complaint or notification of alleged misconduct involving sex discrimination (in particular, sexual harassment) that involves an employee complainant and an employee respondent, the District Compliance Officer should consult with the Title IX Coordinator and/or the Board's Legal Counsel concerning which law – it may be both – the District will need to comply with when investigating the allegations.]**

Under all circumstances, the CO shall offer and coordinate supportive measures, as appropriate, in accordance with this policy  and AG 1422 **[END OF OPTION]**.

### **Complaints:**

The following people may make a complaint of Prohibited Conduct – i.e., request that the District investigate and determine whether Prohibited Conduct occurred:

A. a "complainant," which includes:

1. an employee of the District who is alleged to have been subjected to conduct that could constitute Prohibited Conduct; or
2. a person other than an employee of the District who is alleged to have been subjected to conduct that could constitute Prohibited Conduct at a time when that individual was participating or attempting to participate in the District's education programs or activities;

B. an authorized legal representative with the legal right to act on behalf of a complainant;

C. the District Compliance Officer.

A person is entitled to make a complaint of unlawful harassment only if they themselves are alleged to have been subjected to the unlawful harassment, or if the CO initiates a complaint.

**[DRAFTING NOTE: This paragraph emphasizes that in order for a person to file a complaint of unlawful harassment, the person has to have been subjected to the alleged misconduct directly or be a person who has a legal right to act on behalf of the person who was subjected to the alleged misconduct. This is consistent with the prior paragraph, where the complainant is identified as an employee who was "subjected to conduct that could constitute Prohibited Conduct." The following paragraph, on the other hand, expands who can file a complaint – when the alleged Prohibited Conduct does not involve unlawful harassment, or the complaint involves allegations of retaliation – to persons who are aware of the alleged Prohibited Conduct, even if that person was not directly affected by or subject to the alleged Prohibited Conduct.]**

With respect to complaints of Prohibited Conduct other than unlawful harassment, or complaints involving allegations of retaliation, in addition to the people listed above, the following persons have a right to make a complaint:

A. any employee of the District; or

B. any person other than an employee who was participating or attempting to participate in the District's education programs or activities at the time of the alleged Prohibited Conduct.

The District may consolidate complaints of Prohibited Conduct against more than one (1) respondent, or by more than one (1) complainant against one (1) or more respondents, or by one (1) party against another party, when the allegations of Prohibited Conduct arise out of the same facts or circumstances. When more than one (1) complainant or more than one (1) respondent is involved, references below to a party, complainant, or respondent include the plural, as applicable.

A person may file criminal charges simultaneously with filing a complaint. A person does not need to wait until the District's internal grievance procedures are completed before filing a criminal complaint. Likewise, questions or complaints relating to alleged violations of applicable Federal or State laws may be filed with the U.S. Department of Education's Office for Civil Rights, the U.S. Department of Justice's Civil Rights Division, the U.S. Equal Employment Opportunity Commission, or the Michigan Department of Civil Rights, at any time based on the underlying statutory basis for the complaint.

### **Basic Requirements:**

The District will treat complainants and respondents equitably.

All persons involved with implementing the grievance procedures and any other aspects of this Policy, including the District Compliance Officer, the investigator, the decisionmaker, and the appeal decisionmaker, ~~( )~~ and the ~~facilitator of the informal resolution process,~~ ~~[END OF OPTION]~~ shall be free from any conflicts of interest or bias for or against complainants or respondents generally or an individual complainant or respondent.

The CO may serve simultaneously as an investigator and/or a decisionmaker. ~~[END OF OPTION]~~ **[DRAFTING NOTE: Neola recommends the Board select this OPTION; note it is "may" (i.e., optional) so the CO can decide when to serve in both roles and when to designate one or more persons to perform these responsibilities in a given case.]**

If the CO does not intend to serve as the investigator/decisionmaker in a specific case, the CO shall designate one (1) or more administrators who are appropriately trained to serve in the role.

In circumstances when the CO and trained administrators do not have time/capacity to serve, or are prevented due to a conflict of interest, bias, or partiality, or other reasons impair the CO and other trained administrators from serving as an investigator/decisionmaker in a specific case, the CO shall , in consultation with ~~( )~~ and approval of ~~[END OF OPTION]~~ the Superintendent or ~~( )~~ Board  Board President (as appropriate), ~~[END OF OPTION]~~ secure one (1) or more independent third parties to serve as the investigator and/or decisionmaker.

The District presumes that the respondent is not responsible for the alleged Prohibited Conduct until a determination is made at the conclusion of its grievance procedures.

Under ordinary circumstances, the Board expects to complete the major stages of the grievance procedures within the timeframe specified below:

A. **Evaluation** – The District Compliance Officer will determine whether to dismiss a complaint or investigate it within ~~ten~~  ~~(10 )~~ business ~~[INSERT AMOUNT]~~ days of receiving the complaint. **[DRAFTING NOTE: Neola recommends that the evaluation stage be completed within ten (10) days of the CO receiving notice of the complaint.]**

B. **Investigation** – The CO, or designated investigator/decisionmaker, shall ordinarily complete the investigation (i.e., collect relevant evidence that is not otherwise impermissible) and issue a Determination (i.e., consider the relevant and not otherwise impermissible evidence and decide whether Prohibited Conduct occurred) within ~~twenty~~  ~~(20 )~~ business ~~[INSERT AMOUNT]~~ days of the CO determining the charges require investigation. **[DRAFTING NOTE: Recognizing that it is important for investigations to be completed and Determinations issued in a prompt and equitable manner, Neola recommends that a school district typically complete an investigation and issue a Determination within twenty (20) days.]**

**[DRAFTING NOTE: If the investigator/decisionmaker is someone other than the CO, upon written request from the investigator/decisionmaker, the CO should be permitted to approve a reasonable extension of time for the investigation to be completed and the Determination issued. If the CO is the investigation/decisionmaker: upon written request from the CO, the Superintendent should be permitted to approve a reasonable extension of time for the investigation to be completed and the Determination issued. In either situation, the administrator granting the extension should communicate to the parties the new deadline along with a rationale for the extension.]**

If, however, the CO, or designated investigator/decisionmaker, determines that the investigation is going to take longer, the CO will so notify the parties  and the Superintendent ~~[END OF OPTION]~~ and will thereafter keep the parties  and the Superintendent ~~[END OF OPTION]~~ informed of the status of the matter on a ~~regular~~  ~~[INSERT TIME PERIOD – E.G., BIWEEKLY OR REGULAR]~~ basis.

C. **Appeal** – A party filing an appeal of the CO's decision to dismiss a complaint , or the Determination, ~~[END OF OPTION]~~ must do so within ~~five~~  ~~(5 )~~ business ~~[INSERT AMOUNT]~~ days of receiving the Dismissal  or Determination ~~[END OF OPTION]~~. **[DRAFTING NOTE: Neola recommends the Board allow limited appeals based on the Determination. See DRAFTING NOTE below in the appeal section.]**

The CO, or the Superintendent if the CO is the individual requesting an extension, may approve reasonable extensions of the preceding timeframes on a case-by-case basis for good cause with notice to the parties.

The District will take reasonable steps to protect the privacy of the parties and witnesses.  These steps will not restrict the ability of the parties to present evidence or otherwise participate in the grievance procedures. ~~[END OF OPTION]~~ The parties shall not engage in retaliation, including against witnesses.

The CO, or designated investigator/decisionmaker, shall objectively evaluate all evidence that is relevant and not otherwise impermissible — including both inculpatory and exculpatory evidence. Credibility determinations shall not be based on a person's status as a complainant, respondent, or witness.

The following types of evidence, and questions seeking such evidence, are impermissible (i.e., will not be accessed or considered,

except by the District to determine whether one of the exceptions listed below applies; will not be disclosed; and will not otherwise be used), regardless of whether they are relevant:

- A. evidence that is protected under a privilege recognized by Federal or State law, unless the person to whom the privilege or confidentiality is owed voluntarily waived the privilege or confidentiality; and
- B. a party's or witness's records that are made or maintained by a physician, psychologist, or other recognized professional or paraprofessional in connection with the provision of treatment to the party or witness, unless the District obtains that party's or witness's voluntary, written consent for use in its grievance procedures.

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

Upon initiation of the Board's grievance procedures, the District Compliance Officer shall notify the parties of the following:

- A. the Board's grievance procedures  and informal resolution process **[END OF OPTION]** associated with claims involving Prohibited Conduct; **[DRAFTING NOTE: Neola encourages the Board to include an informal resolution process.]**
- B. sufficient information available at the time to allow the parties to respond to the allegations, including the identities of the parties involved in the incident(s), the conduct alleged to constitute Prohibited Conduct, and the date(s) and location(s) of the alleged incident(s); and
- C. retaliation is prohibited.

Should the CO decide, at any point, to investigate allegations that are materially beyond the scope of the initial written notice, the CO will provide a supplemental written notice describing the additional allegations to be investigated.

#### **Dismissal of a Complaint:**

The CO may dismiss a complaint of Prohibited Conduct if:

- A. the District is unable to identify the respondent after taking reasonable steps to do so;
- B. the respondent is not participating in the District's education program or activity and is not employed by the Board;
- C. the complainant voluntarily withdraws any or all the allegations in the complaint, the CO declines to initiate a complaint, and the District determines that, without the complainant's withdrawn allegations, the conduct that remains alleged in the complaint, if any, would not constitute Prohibited Conduct even if proven; or
- D. the District determines the conduct alleged in the complaint, even if proven, would not constitute Prohibited Conduct. Before dismissing the complaint, the CO will make reasonable efforts to clarify the allegations with the complainant.

Upon dismissal, the CO will promptly notify, in writing, the complainant of the basis for the dismissal. If the dismissal occurs after the respondent has been notified of the allegations, the CO will also simultaneously notify, in writing, the respondent of the dismissal and the basis for the dismissal.

The CO will further notify the complainant that a dismissal may be appealed and will provide the complainant with an opportunity to appeal the dismissal of the complaint. If the dismissal occurs after the respondent has been notified of the allegations, then the CO will also notify the respondent that the dismissal may be appealed.

Dismissals may be appealed on the following bases:

- A. procedural irregularity that would change the outcome;
- B. new evidence that would change the outcome and that was not reasonably available when the dismissal was made; and
- C. the CO had a conflict of interest or bias for or against complainants or respondents generally, or the individual complainant or respondent, that would change the outcome.

If the dismissal is appealed, the CO will:

- A. notify the parties of any appeal, including notice of the allegations, if notice was not previously provided to the respondent;
- B. implement appeal procedures equally for the parties;
- C. ensure that the appeal decisionmaker did not take part in the original dismissal of the complaint;
- D. ensure that the appeal decisionmaker has been trained consistent with this Policy  and AG 1422 **[END OF OPTION]**;
- E. provide the parties a reasonable and equal opportunity to make a statement in support of, or challenging, the outcome; and

F. notify the parties of the result of the appeal and the rationale for the result.

When a complaint is dismissed, the CO will, at a minimum:

- A. offer supportive measures to the complainant as appropriate;
- B. if the respondent has been notified of the allegations, offer supportive measures to the respondent as appropriate; and
- C. take other prompt and effective steps, as appropriate, to ensure that Prohibited Conduct does not continue or recur within the District's education programs or activities.

**[DRAFTING NOTE: Neola encourages the Board to select the following option so the CO can choose, in appropriate circumstances, to offer the parties the opportunity to participate in an informal resolution process, or to honor the parties' request to use an informal resolution process, to end the Prohibited Conduct, prevent its recurrence, and remedy its effects.]**

**[OPTIONAL LANGUAGE: INFORMAL RESOLUTION PROCESS]**

**Informal Resolution Process:**

In lieu of resolving a complaint through the Board's formal grievance procedures, the parties may instead elect to participate in an informal resolution process. The District will not offer informal resolution to resolve a complaint when such a process would conflict with Federal, State, or local law.

**[END OF OPTIONAL LANGUAGE: INFORMAL RESOLUTION PROCESS]**

**Adding Allegations and/or Consolidating Complaints:**

If, in the course of an investigation, the District decides to investigate additional allegations of Prohibited Conduct by the respondent toward the complainant that are not included in the original Notice of Allegations or to consolidate charges raised in a different complaint involving the same respondent, the CO will notify the parties of the additional allegations.

**Investigation:**

The District will provide for an adequate, reliable, and impartial investigation of complaints.

The burden is on the District — not on the parties — to conduct an investigation that gathers sufficient evidence to determine whether Prohibited Conduct occurred.

The CO, or the designated investigator/decisionmaker, will provide an equal opportunity for the parties to present fact witnesses and other inculpatory and exculpatory evidence that are relevant and not otherwise impermissible.

The CO, or the designated investigator/decisionmaker, will review all evidence gathered through the investigation and determine what evidence is relevant and what evidence is impermissible, regardless of relevance.

**Determination of Whether Prohibited Conduct Occurred:**

Following an investigation and evaluation of all relevant and not otherwise impermissible evidence, the CO or designated investigator/decisionmaker will:

- A. Use the preponderance of the evidence standard of proof to determine whether Prohibited Conduct occurred. This standard of proof requires the decisionmaker to evaluate relevant and not otherwise impermissible evidence for its persuasiveness. If the decisionmaker, applying the applicable standard, is not persuaded by the relevant and not otherwise impermissible evidence that Prohibited Conduct occurred, regardless of the quantity of the evidence, the decisionmaker will not determine that Prohibited Conduct occurred. **[DRAFTING NOTE: While a board of education could elect to use the "clear and convincing" evidence standard of proof, Neola does not recommend it. If a board does select the "clear and convincing" standard, it should use it in all other comparable proceedings. Neola expects it will be a rare situation when a board chooses to use a clear and convincing standard of proof.]**
- B. Notify the parties, in writing, of the determination whether Prohibited Conduct occurred, including the rationale for such determination  and the procedures and permissible bases for the complainant and respondent to appeal **[END OF OPTION]**.
- C. Not impose discipline on a respondent for Prohibited Conduct unless there is a determination at the conclusion of the grievance procedures that the respondent engaged in Prohibited Conduct.
- D. If there is a determination that Prohibited Conduct occurred, the CO will, as appropriate:

- 1. coordinate the provision and implementation of remedies to a complainant and other people the District identifies as having had equal access to the District's education programs or activities limited or denied by the Prohibited Conduct;

2. coordinate the imposition of any disciplinary sanctions on a respondent , including notification to the complainant of any such disciplinary sanctions **[END OF OPTION]**; and
3. take other appropriate prompt and effective steps to ensure that the Prohibited Conduct does not continue or recur within the District's education programs or activities.

E. Comply with the grievance procedures before the imposition of any disciplinary sanctions against a respondent.

F. Not discipline a party, witness, or others participating in the grievance procedures for making a false statement based solely on the determination of whether Prohibited Conduct occurred.

**[DRAFTING NOTE: If the CO dismisses a complaint in the Evaluation stage (i.e., prior to commencing an investigation), the complainant may appeal as set forth above. Neola also recommends the Board include an appeal process related to the Determination.]**

**[OPTIONAL LANGUAGE - APPEAL OF DETERMINATION]**

**Appeal of Determinations:**

If a party disagrees with the decisionmaker's determination as to whether Prohibited Conduct occurred, the party may file an appeal. Appeals must be submitted, in writing, within **five ( 5 ) business (INSERT AMOUNT)** days of the appealing party's receipt of the Determination.

A party may appeal a Determination on the following bases:

- A. procedural irregularity that would change the outcome;
- B. new evidence that would change the outcome and that was not reasonably available when the investigation occurred and the Determination was made; and
- C. the CO, or the designated investigator/decisionmaker, had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that would change the outcome;

**[DRAFTING NOTE: The Board may insert additional grounds on which an appeal may be filed.]**

- D. ~~(-) the recommended remedies (including disciplinary sanctions/consequences) are unreasonable in light of the findings of fact (i.e., the nature and severity of the Prohibited Conduct).~~
- E. ~~(-) [OTHER] \_\_\_\_\_.~~

~~The complainant may not challenge the ultimate disciplinary sanction/consequence that is imposed. **[END OF OPTION]**~~

**[DRAFTING NOTE: The following options are offered in case the Board wants the Superintendent to serve as the appeal decisionmaker or the Board wants to nominally be identified as the appeal decisionmaker but will be delegating the responsibility to a person who is properly trained. Neola does not recommend that the Board itself be named as the appeal decisionmaker because of the preference for the decisionmaker to be trained to render a decision. If the Board wants to serve as the appeal decisionmaker, it should discuss this issue with its Legal Counsel. Select OPTION 1 or OPTION 2 below.]**

~~**[OPTION 1]**~~

~~The CO will designate an appeal decisionmaker, who will be a person who did not conduct the Investigation and render the Determination, and is appropriately trained (-), as set forth in AG 1422 **[END OF INTERNAL OPTION]**.~~

~~The CO has authority (-), in consultation with (-) and approval of **[END OF OPTION]** the Superintendent or (-) Board (-) Board President (as appropriate), **[END OF OPTIONS]** to secure an independent Third Party to serve as the appeal decisionmaker.~~

~~In designating an appeal decisionmaker, the CO will work with the Board to identify and appoint an independent Third Party to serve as the appeal decisionmaker— this individual shall be considered to be the Board's designee and will submit the appeal decision to the Board who will promptly adopt it as written and forward it to the CO who will send it simultaneously to the parties. **[END OF OPTIONAL SENTENCE]**~~

~~**[END OF OPTION 1]**~~

**[OPTION 2]**

The Superintendent shall serve as the appeal decisionmaker, provided the Superintendent has not been otherwise involved in the grievance procedures (i.e., did not serve as the investigator/decisionmaker or informal resolution process facilitator) and is appropriately trained. If the Superintendent is not eligible to serve as the appeal decisionmaker, the CO will designate an appeal

decisionmaker, who will be a person who did not conduct the Investigation and render the Determination, and is appropriately trained , as set forth in AG 1422 **[END OF INTERNAL OPTION]**.

**[END OF OPTION 2]**

**[END OF OPTIONS]**

If a party appeals the Determination, the CO will:

- A. notify the parties of the appeal;
- B. implement appeal procedures equally for the parties;
- C. provide the parties a reasonable and equal opportunity to make a statement in support of, or challenging, the Determination;
- D. provide the appeal decisionmaker with the relevant and not otherwise impermissible evidence and the Determination; and
- E. notify the parties, in writing, of the result of the appeal and the appeal decisionmaker's rationale for the outcome.

**Parties Provided a Reasonable and Equal Opportunity to Make a Statement in Support of, or Challenging, the Dismissal  or Determination [END OF OPTION]**

When a party files an appeal, the party must set forth the reason(s)/basis/bases for the appeal, and the other party will have  five  ( 5 ) business **[INSERT AMOUNT]** days to provide the appeal decisionmaker with a statement in support of their position. Once the decisionmaker receives the statement (or the deadline for filing such a statement expires), the appeal decisionmaker will have  five  ( 5 ) business **[INSERT AMOUNT]** days to issue a decision on the appeal.

**[DRAFTING NOTE: Neola suggests any appeals should be filed within five (5) days of the parties receiving written notice of the Determination. Neola further suggests that the timeline for the other party submitting a statement be equivalent to the timeframe in which an appeal has to be filed. Finally, Neola suggests the appeal decisionmaker have ten (10) days from receipt of the statements to issue a decision.]**

While a party appealing a Determination may argue the reason/basis for the appeal is that new evidence has been discovered/obtained that would change the outcome and that said new evidence was not reasonably available when the Determination was originally made, the party may not submit the new or additional evidence during the appeal process. Rather, the party appealing should identify/describe in detail the evidence, including how and when it was discovered/obtained, and explain why it was not reasonably available during the Investigation (i.e., prior to the Determination). If the appeal decisionmaker accepts the proffered explanation, the appeal decisionmaker should remand the case back to the investigator/decisionmaker (i.e., reopen the investigation) so the new evidence may be submitted and considered by the other party and the investigator/decisionmaker.

The appeal decisionmaker shall determine the outcome of the appeal based on the appeal decisionmaker's independent review of the record (i.e., the relevant and not otherwise impermissible evidence and the written determination) and the appeal decisionmaker's application of the law and Board policy to the facts in the record. The appeal decisionmaker must give due deference and due weight to the decisionmaker's factual findings and credibility determinations and should not overturn them unless non-testimonial extrinsic evidence in the record justifies a contrary conclusion or unless the record read in its entirety compels a contrary conclusion. Generally, the appeal decisionmaker is expected to uphold the original Determination unless the appeal decisionmaker concludes the original Determination is unlawful, unreasonable, or against the manifest weight of the evidence. Every reasonable presumption must be made in favor of the original Determination.

The appeal decisionmaker shall

**[DRAFTING NOTE: The Board must select either OPTION 1 or OPTION 2 unless the Board appointed an independent Third Party to serve as the Board's appeal decisionmaker, in which case the Board should select OPTION 3.]**

**[OPTION 1]**

simultaneously notify the parties, in writing, of the result of the appeal and the rationale for the outcome.

**[END OF OPTION 1]**

**{OR}**

**[OPTION 2]**

~~notify the CO, in writing, of the result of the appeal and the rationale for the outcome. The CO will then simultaneously notify the parties, in writing, of the result of the appeal and the appeal decisionmaker's rationale for the outcome.~~

~~**[END OF OPTION 2]**~~

~~**{OR}**~~

**( ) [OPTION 3]**

submit the appeal decision to the Board who will promptly adopt it as written and forward it to the CO, who will send it simultaneously to the parties. The appeal decision shall set forth the result of the appeal and the appeal decisionmaker's rationale for the outcome.

**[END OF OPTION 3]**

The  appeal decisionmaker's ~~( ) Board's~~ **[END OF OPTION]** decision shall be final.

**[END OF OPTIONAL LANGUAGE - APPEAL OF DETERMINATION]**

**Supportive Measures:**

The District will offer and coordinate supportive measures as appropriate for the complainant and/or respondent to restore or preserve that person's access to the District's education programs or activities or provide support during the grievance procedures and/or during the informal resolution process. For allegations of Prohibited Conduct other than prohibited harassment or retaliation, the District's provision of support measures does not require the District, Board employees, or any other person authorized to provide aid, benefit, or service on the District's behalf to alter the alleged discriminatory/retaliatory conduct for the purpose of providing a supportive measure.

The CO shall determine appropriate supportive measures on a case-by-case basis. Supportive measures may vary depending on what the CO deems to be reasonably available. Supportive measures may include, but are not limited to: modifications of work schedules, mutual restrictions on contact between the parties; changes in work locations; leaves of absence; increased security and monitoring of certain work settings; training related to Prohibited Conduct;  referral to Employee Assistance Program; **[END OF OPTION]** and other similar measures.

Supportive measures must not unreasonably burden either party and must be designed to protect the safety of the parties and/or the District's educational environment, or to provide support during the Board's grievance procedures or the informal resolution process.

The District will not impose such measures for punitive or disciplinary reasons.

The CO may, as appropriate, modify or terminate supportive measures at the conclusion of the grievance procedures, or at the conclusion of the informal resolution process, or the District may continue them beyond that point.

A party may seek additional modification or termination of a supportive measure applicable to them if circumstances change materially.

The District will not disclose information about any supportive measures to persons other than the person to whom they apply, including informing one party of supportive measures provided to another party, unless necessary to provide the supportive measure or restore or preserve a party's access to the District's education programs or activities, or as otherwise permitted under existing law and/or policy.

The Superintendent may place an employee respondent on administrative leave from employment responsibilities during the pendency of the Board's grievance procedures.

**Disciplinary Sanctions and Remedies:**

Following a determination that Prohibited Conduct occurred, the District may impose disciplinary sanctions, which may include:

- A.  oral or written warning;
- B.  written reprimands;
- C.  required counseling;
- D.  required training or education;
- E.  demotion;
- F.  suspension with pay;

**[END OF OPTIONS]**

- G. suspension without pay;
- H. termination; and

I. any other sanction authorized by any applicable Board policy, Employee/Administrator Handbook, and/or collective bargaining agreement.

The District may also provide remedies, which may include disciplinary sanctions/consequences. The CO will notify the Superintendent of the recommended remedies, so an authorized administrator can consider the recommendation and implement appropriate remedies in compliance with applicable due process procedures, whether statutory or contractual.

**[DRAFTING NOTE: The Board should review applicable policy(ies)/administrative guidelines/employee handbooks to determine whether changes are needed to establish timelines associated with imposition of discipline as a result of possible delays caused by the Board implementing the preceding grievance procedures; likewise, the Board may need to discuss with union representatives how implementation of the grievance procedures may impact any disciplinary provisions contained in applicable collective bargaining (e.g., timelines, permitted attendees at investigative interviews, etc.).]**

Discipline of an employee will be implemented in accordance with Federal and State law, Board policy, and applicable provisions of any relevant collective bargaining agreement.

### **Retaliation**

Retaliation against a person who makes a report or files a complaint alleging Prohibited Conduct or retaliation, or participates in an investigation, is prohibited. Neither the Board nor any other person may intimidate, threaten, coerce, or discriminate against any individual for the purpose of interfering with any right or privilege secured by the U.S. Constitution, the Michigan Constitution, Federal or State law, or this policy, or because the individual made a report or complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing under this policy. Intimidation, threats, coercion, or discrimination, including initiating a disciplinary process against a person for a code of conduct violation that does not involve Prohibited Conduct but arises out of the same facts and circumstances as a complaint or information reported about possible Prohibited Conduct, for the purpose of interfering with the exercise of any right or privilege secured by Federal or State law constitutes retaliation. Retaliation against a person for making a complaint or participating in an investigation is a serious violation of this policy that can result in the imposition of disciplinary sanctions/consequences and/or other appropriate remedies.

Complaints alleging retaliation may be filed according to the grievance procedures set forth above. The District shall initiate its grievance procedures upon receiving any complaint alleging retaliation.

The exercise of rights protected under the First Amendment of the United States Constitution does not constitute retaliation prohibited under this policy.

Charging an individual with a code of conduct violation for making a materially false statement in bad faith in the course of a grievance proceeding under this policy shall not constitute retaliation, provided, however, that a determination that Prohibited Conduct occurred, alone, is not sufficient to conclude that any party made a materially false statement in bad faith.

### **Privacy/Confidentiality**

The District will employ all reasonable efforts to protect the rights of the complainant, the respondent(s), and the witnesses as much as possible, consistent with the Board's legal obligations to investigate, to take appropriate action, and to conform with any discovery or disclosure obligations. The District will keep confidential the identity of any individual who has made a complaint of Prohibited Conduct, any complainant, any individual who has been reported to be the perpetrator of Prohibited Conduct, any respondent, and any witness, except as may be permitted by the Family Educational Rights and Privacy Act ("FERPA"), 20 U.S.C. 1232g, or FERPA regulations, 34 C.F.R. part 99, or as required by law, or to carry out the purposes of relevant Federal or State law or regulations, including the conduct of any investigation, hearing, or judicial proceeding arising thereunder (i.e., the District's obligation to maintain confidentiality shall not impair or otherwise affect the complainant's and respondent's receipt of the information to which they are entitled related to the investigation and determination of whether Prohibited Conduct occurred). All records generated under the terms of this policy shall be maintained as confidential to the extent permitted by law. Confidentiality, however, cannot be guaranteed. Additionally, the respondent must be provided the complainant's identity.

During an investigation, the CO or designated investigator/decisionmaker will instruct each person who is interviewed about the importance of maintaining confidentiality. Any individual who is interviewed as part of an investigation is expected not to disclose to other members of the School District Community or Third Parties any information that is learned or provided during the course of the investigation.

### **Sanctions and Monitoring**

The Board shall vigorously enforce its prohibitions against Prohibited Conduct by taking appropriate action reasonably calculated to stop and prevent further misconduct. While observing the principles of due process, a violation of this policy may result in disciplinary action up to and including the discharge of an employee. All disciplinary action will be taken in accordance with applicable State law and the terms of the relevant collective bargaining agreement(s). When imposing discipline, the Superintendent shall consider the totality of the circumstances involved in the matter. In those cases where Prohibited Conduct is not substantiated, the Board may consider whether the alleged conduct nevertheless warrants discipline in accordance with other Board policies, consistent with the terms of the relevant collective bargaining agreement(s).

When the Board becomes aware that a prior remedial action has been taken against a member of the School District community, all subsequent sanctions imposed by the Board and/or Superintendent shall be reasonably calculated to end such conduct, prevent its reoccurrence, and remedy its effects.

### **Application of the First Amendment**

The Board will construe and apply this policy consistent with the First Amendment to the U.S. Constitution  and the principles of academic freedom as set forth in the applicable collective bargaining agreement **[END OF OPTION]**. In no case will a respondent be found to have committed Prohibited Conduct based on expressive conduct that is protected by the First Amendment  and/or the principles of academic freedom specified in the Board's collective bargaining agreement with its teachers **[END OF OPTION]**.

### **Training**

All employees, investigators, decisionmakers, facilitators of informal resolution process, the District Compliance Officer(s), and other persons who are responsible for implementing the Board's grievance procedures or have the authority to modify or terminate supportive measures shall receive training related to their duties under applicable Federal and State laws and this policy.  The training shall be provided promptly upon hiring or a change of position that alters their duties under this policy, and annually thereafter. **[END OF OPTIONAL SENTENCE]** The training shall not rely on stereotypes involving Protected Classes.

~~Training materials will be made available for inspection upon request by members of the public. **[END OF OPTION]**~~

### **Recordkeeping (including retention of investigatory records and materials)**

The District Compliance Officer(s) is/are responsible for overseeing retention of all records that must be maintained pursuant to this policy. All individuals charged with conducting investigations under this policy must retain all information, documents, electronically stored information, and electronic media (as defined in Policy 8315) created and received as part of an investigation. Records and materials associated with the implementation of this policy shall be retained in accordance with Policy 8310, Policy 8315, Policy 8320, and Policy 8330 for the period set forth below, unless required to be maintained for a longer period pursuant to the District's records retention schedule.

**[DRAFTING NOTE: For purposes of uniformity, Neola recommends that the Board use the same seven (7) year period for recordkeeping that is required by the 2020 Title IX regulations - see Board Policy 2266; if the Board selects a different timeframe for maintaining the below specified records, it should verify the time period selected is consistent with and/or reflected in its record retention schedule – see AG 8310.]**

The District shall maintain for a period of seven (7) calendar years the following records:

- A. for each complaint of Prohibited Conduct, records documenting the informal resolution process and/or the grievance procedures followed and the resulting outcome;
- B. for each notification that the District Compliance Officer receives of information about conduct that reasonably may constitute Prohibited Conduct, records documenting the actions the District took to implement this policy; and
- C. all materials used to provide the training referenced above  and in AG 1422 **[END OF OPTION]**.

The information, documents, ESI, and electronic media (as defined in Policy 8315) retained may include public records and records exempt from disclosure under Federal and/or State law (e.g., student records, medical records).

### **Outside Appointments, Dual Appointments, and Delegations**

The Board retains discretion to appoint suitably qualified persons who are not Board employees to fulfill any function of the Board under this policy including, but not limited to, District Compliance Officer, investigator, decisionmaker, appeal decisionmaker, or facilitator of the informal resolution process.

The Board also retains discretion to appoint two (2) or more persons to jointly fulfill the role of District Compliance Officer, investigator, decisionmaker, appeal decisionmaker, and facilitator of the informal resolution process.

The Superintendent may delegate functions assigned to a specific Board employee under this policy including, but not limited to, the functions assigned to the District Compliance Officer, investigator, decisionmaker, appeal decisionmaker, and facilitator of the informal resolution process to any suitably qualified individual, and such delegation may be rescinded by the Superintendent at any time.

**[DRAFTING NOTE: The following option expressly sets forth authority that the Board has, regardless of whether it is included in this policy, but is offered for those boards of education that may want to affirmatively communicate to/address these issues for readers of this policy.]**

### ~~Discretion in Application~~

~~The Board retains discretion to interpret and apply this policy in a manner that is not clearly unreasonable, even if the Board's interpretation or application differs from the interpretation of any specific complainant and/or respondent.~~

Despite the Board's reasonable efforts to anticipate all eventualities in drafting this policy, it is possible that unanticipated or extraordinary circumstances may not be specifically or reasonably addressed by the express policy language, in which case the Board retains discretion to respond to the unanticipated or extraordinary circumstance in a way that is not clearly unreasonable.

The provisions of this policy are not contractual in nature, whether in their own right or as part of any other express or implied contract. Accordingly, the Board retains discretion to revise this policy at any time and for any reason. The Board may apply policy revisions to an active case provided that doing so is not clearly unreasonable.

**[END OF OPTION]**

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Legal

- M.C.L. 37.2101 et seq., 37.1101 et seq.
- 20 U.S.C. 1092(F)(6)(A)(v)
- 20 U.S.C. 1232g
- 20 U.S.C. Section 1681, Title IX of Education Amendment Act
- 20 U.S.C. Section 1701 et seq., Equal Educational Opportunities Act of 1974
- 20 U.S.C. Section 7905, Boy Scouts of America Equal Access Act
- 29 C.F.R. Part 1635
- 29 U.S.C. 201 et seq., The Fair Labor Standards Act ("FLSA")
- 29 U.S.C. 218d, PUMP for Nursing Mothers Act ("PUMP Act")
- 29 U.S.C. 621 et seq., Age Discrimination in Employment Act of 1967
- 29 U.S.C. 701 et seq. (in particular 794), Rehabilitation Act of 1973, as amended
- 34 C.F.R. Part 110 (7/27/93)
- 38 U.S.C. Chapter 43 4301-4335 (see in particular 4311(a) [prohibits discrimination based on military service] and 4312 [reemployment rights]), Uniformed Services Employment and Reemployment Rights Act ("USERRA")
- 42 U.S.C. 1983
- 42 U.S.C. 2000d et seq.
- 42 U.S.C. 2000e et seq., Civil Rights Act of 1964 (e.g., Title VI and Title VII), as amended by the Pregnancy Discrimination Act
- 42 U.S.C. 2000ff et seq., The Genetic Information Nondiscrimination Act
- 42 U.S.C. 2000gg, Pregnant Workers Fairness Act ("PWFA")
- 42 U.S.C. 6101 et seq., Age Discrimination Act of 1975
- 42 U.S.C. 12101 et seq., The Americans with Disabilities Act of 1990, as amended
- Fourteenth Amendment, U.S. Constitution

**Last Modified by Jennifer Perkins on March 17, 2026**

Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Copy of SECTION 504/ADA PROHIBITION AGAINST DISABILITY DISCRIMINATION IN EMPLOYMENT
Code	po1623
Status	1st Reading
Adopted	July 10, 2014
Last Revised	March 27, 2023
Last Reviewed	March 13, 2026

#### 1623 - **SECTION 504/ADA PROHIBITION AGAINST DISABILITY DISCRIMINATION IN EMPLOYMENT**

The Board of Education prohibits discrimination against any employee or applicant based upon **the employee's or applicant's** disability. As such, the Board will not engage in employment practices or adopt policies that discriminate on the basis of disability, or otherwise discriminate against qualified individuals with disabilities in regard to job application procedures, the hiring, advancement or discharge of employees, employee compensation, job training, or other terms, conditions and privileges of employment. The Board further will not limit, segregate or classify applicants or employees in any way that adversely affects their opportunities or status because of disability. Additionally, the Board will not participate in any contractual or other relationships that have the effect of subjecting qualified individuals with disabilities who are applicants or employees to discrimination on the basis of disability.

"An individual with a disability" means a person who has, had a record of, or is regarded as having, a physical or mental impairment that substantially limits one (1) or more major life activities. Major life activities are functions such as caring for one's self, performing manual tasks, walking, seeing, hearing, eating, sleeping, standing, lifting, bending, speaking, breathing, learning, reading, concentrating, thinking, communicating, sitting, reaching, interacting with others, and working.

Major life activities also include the operation of a major bodily function, including, but not limited to, functions of the immune system, special sense organs and skin, normal cell growth, and digestive, genitourinary, bowel, bladder, neurological, brain, respiratory, circulatory, endocrine, hemic, lymphatic, musculoskeletal and reproductive functions. The operation of a major bodily function includes the operation of an individual organ within a body system.

An impairment that is episodic in nature or in remission is considered a disability if it would substantially limit a major life activity when active.

The determination of whether an impairment substantially limits a major life activity must be made without regard to the ameliorative effects of mitigating measures such as medication, medical supplies, equipment or appliances, low-vision devices (defined as devices that magnify, enhance, or otherwise augment a visual image, but not including ordinary eyeglasses or contact lenses), prosthetics (including limbs and devices), hearing aid(s) and cochlear implant(s) or other implantable hearing devices, mobility devices, oxygen therapy equipment or supplies, use of assistive technology, reasonable accommodations or "auxiliary aids or services," learned behavioral or adaptive neurological modifications, psychotherapy, behavioral therapy, or physical therapy.

A qualified person with a disability means the individual satisfies the requisite skill, experience, education and other job-related requirements of the employment position such individual holds or desires and, with or without reasonable accommodation, can perform the essential functions of the job in question.

The Board will provide a reasonable accommodation to a qualified individual who has an actual disability or who has a record of a disability, unless the accommodation would impose an undue hardship on the operation of the District's program and/or activities. A reasonable accommodation is not required for an individual who is merely regarded as having a disability.

#### **Compliance Officer(s)**

The Board designates the following individual(s) to serve as the District's 504 Compliance Officer(s)/ADA Coordinator(s) (hereinafter referred to as the "District Compliance Officer(s)").

Patrick Wolynski  
Executive Director Staff & Student Services  
248-435-8400 x1211  
800 Devillen, Royal Oak, MI 48073  
patrick.wolynski@royaloakschools.org

Katherine Abela  
Executive Director Finance and Facilities  
248-435-8400 x1232  
800 Devillen, Royal Oak, MI 48073  
katherine.abela@royaloakschools.org

The names, titles, and contact information of these individuals will be published annually on the School District's web site.

The District Compliance Officer(s) are responsible for coordinating the District's efforts to comply with and fulfill its responsibilities under Section 504 and Title II of the Americans with Disabilities Act, as amended ("ADA"). A copy of Section 504 and the ADA, including copies of their implementing regulations, may be obtained from the District Compliance Officer(s).

The District Compliance Officer(s) will oversee the investigation of any complaints of discrimination based on disability, which may be filed pursuant to the Board's adopted internal complaint procedure, and will attempt to resolve such complaints. The Board will provide for the prompt and equitable resolution of complaints alleging violations of Section 504/ADA. See below.

### **Training**

The District Compliance Officer(s) will also oversee the training of employees in the District so that all employees understand their rights and responsibilities under Section 504 and the ADA, and are informed of the Board's policies, administrative guidelines and practices with respect to fully implementing and complying with the requirements of Section 504/ADA.

The Board will provide in-service training and consultation to staff responsible for the education of persons with disabilities, as necessary and appropriate.

### **Facilities**

No qualified person with a disability will, because the District's facilities are inaccessible to or unusable by persons with disabilities, be denied the benefits of, be excluded from participation in, or otherwise be subjected to discrimination under any program or activity to which Section 504/ADA applies.

For facilities constructed or altered after June 3, 1977, the District will comply with applicable accessibility standards. For those existing facilities constructed prior to June 3, 1977, the District is committed to operating its programs and activities so that they are readily accessible to persons with disabilities.

### **Notice**

Notice of the Board's policy on nondiscrimination in employment practices and the identity of the District's Compliance Officer(s) will be published on the District's website and posted throughout the District, and included the District's recruitment statements or general information publications.

### **Complaint Procedures**

If a person believes that they have s/he has been discriminated against on the basis of his/her disability, the person may utilize the following complaint procedures as a means of reaching, at the lowest possible administrative level, a prompt and equitable resolution of the matter.

In accordance with Section 504 of the Rehabilitation Act of 1973 and its implementing regulations ("Section 504"), employees will be notified of their right to file an internal complaint regarding an alleged violation, misinterpretation or misapplication of Section 504. In addition, employees will be notified of their right to file a complaint with the U.S. Department of Education's Office for Civil Rights.

Internal complaints must be put in writing and must identify the specific circumstances or areas of dispute that have given rise to the complaint, and offer possible solutions to the dispute. The complaint must be filed with a District Compliance Officer within the time limits specified below. The District's Compliance Officer is available to assist individuals in filing a complaint.

Unless expressly stated otherwise, the term "day" or "days" as used in this policy means business day(s) (i.e., a day(s) that the Board office is open for normal operating hours, Monday - Friday, excluding State-recognized holidays).

### **Internal Complaint Procedure**

The following internal complaint procedure is available to the prompt and equitable resolution of complaints alleging discrimination based upon disability. This complaint procedure is not available to unsuccessful applicants. Use of the internal complaint procedure is not a prerequisite to the pursuit of other remedies, including the filing of a complaint with the U.S. Department of Education's Office for Civil Rights.

- A. An employee with a complaint based on alleged discrimination on the basis of disability may first discuss the problem with the District Compliance Officer.
- B. If the informal discussion does not resolve the matter, or if the employee skips Step A, the individual may file a formal written complaint with the District Compliance Officer. The written complaint must contain the name and address of the individual or representative filing the complaint, be signed by the complainant or someone authorized to sign for the complainant, describe the alleged discriminatory action in sufficient detail to inform the District Compliance Officer of the nature and date of the alleged violation, and propose a resolution. The complaint must be filed within thirty (30) days of the circumstances or event giving rise to the complaint, unless the time for filing is extended by the District Compliance Officer for good cause.
- C. The District Compliance Officer will conduct an independent investigation of the matter (which may or may not include a hearing). This complaint procedure contemplates informal, but thorough investigations, affording all interested persons and their representatives, if any, an opportunity to present witnesses and other evidence relevant to the complaint. The District Compliance Officer will provide the complainant with a written disposition of the complaint within ten (10) days. If no decision is rendered within ten (10) days, or the decision is unsatisfactory in the opinion of the complainant, the employee may file, in writing, an appeal with the Superintendent. The District Compliance Officer shall maintain the District's files and records relating to the complaint.
- D. The Superintendent will, within ten (10) days of receiving the written appeal, conduct a hearing with all parties involved in an attempt to resolve the complaint.  
  
The Superintendent will render a his/her decision within ten (10) days of the hearing.
- E. The employee may be represented, at the employee's his/her own cost, at any of the above-described meetings/hearings.
- F. The right of a person to a prompt and equitable resolution of the complaint shall not be impaired by the person's pursuit of other remedies such as the filing of a complaint with the Office for Civil Rights or the filing of a court case. Use of this internal complaint procedure is not a prerequisite to the pursuit of other remedies.

If it is determined that the Complainant was subjected to unlawful discrimination, the CO must identify what corrective action will be taken to stop, remedy, and prevent the recurrence of the discrimination/retaliation. The corrective action should be reasonable, timely, age-appropriate and effective, and tailored to the specific situation.

### OCR Complaint

At any time, if an employee believes that they have s/he has been subjected to discrimination based upon his/her disability in violation of Section 504 or the ADA, the individual may file a complaint with the U.S. Department of Education's Office for Civil Rights ("OCR"). The OCR can be reached at:

#### U.S. Department of Education

Office for Civil Rights  
Lyndon Baines Johnson Department of Education Building  
400 Maryland Ave., SW  
Washington, DC 20202-1100  
Telephone: (800) 421-3481  
FAX: (202) 453-6012  
TDD: 800-877-8339  
E-mail: OCR@ed.gov  
Web: <http://www.ed.gov/ocr>

U.S. Department of Education  
Office for Civil Rights  
Cleveland Office  
1350 Euclid Avenue  
Suite 325  
Cleveland, Ohio 44115  
(216) 522-4970  
FAX: (216) 522-2573  
TDD: (216) 522-4944  
E-mail: OCR.Cleveland@ed.gov  
Web: <http://www.ed.gov/ocr>

### Retaliation

Retaliation against a person who makes a report or files a complaint alleging unlawful harassment/retaliation or participates as a witness in an investigation is prohibited. Neither the Board nor any other person may intimidate, threaten, coerce or interfere with any individual because the person opposed any act or practice made unlawful by any Federal or State civil rights law, or because that individual made a report, formal complaint, testified, assisted or participated or refused to participate in any manner in an investigation, proceeding, or hearing under those laws and/or this policy, or because that individual exercised, enjoyed, aided or encouraged any other person in the exercise or enjoyment of any right granted or protected by those laws and/or this policy.

Retaliation against a person for making a report of discrimination, filing a formal complaint, or participating in an investigation or meeting is a serious violation of this policy that can result in imposition of disciplinary sanctions/consequences and/or other appropriate remedies.

Formal complaints alleging retaliation may be filed according to the internal complaint process set forth above.

The exercise of rights protected under the First Amendment of the United States Constitution does not constitute retaliation prohibited under this policy.

Revised 11/12/15

Revised 6/10/21

Revised 12/8/22

T.C. 3/27/23

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Legal

29 C.F.R. Part 1630

29 U.S.C. 794, Section 504 Rehabilitation Act of 1973, as amended

34 C.F.R. Part 104

42 U.S.C. 12101 et seq., Americans with Disabilities Act of 1990, as amended

**Last Modified by Jennifer Perkins on March 17, 2026**

Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Vol. 40, No. 1 - Nondiscrimination - September 2025 Rescind ANTI-HARASSMENT
Code	po1662
Status	
Adopted	July 10, 2014
Last Revised	March 27, 2023

### **Rescind Policy - Vol. 40, No. 1**

#### **~~1662~~ ANTI-HARASSMENT**

##### **General Policy Statement**

~~It is the policy of the Board of Education to maintain an education and work environment that is free from all forms of unlawful harassment, including sexual harassment. This commitment applies to all School District operations, programs, and activities. All students, administrators, teachers, staff, and all other school personnel share responsibility for avoiding, discouraging, and reporting any form of unlawful harassment. This policy applies to unlawful conduct occurring on school property, or at another location if such conduct occurs during an activity sponsored by the Board.~~

~~The Board will vigorously enforce its prohibition against discriminatory harassment based on race, color, national origin, sex (including sexual orientation and gender identity), disability, age, religion, ancestry, or genetic information (collectively, Protected Classes) that are protected by Federal civil rights laws (hereinafter referred to as unlawful harassment) and encourages those within the School District community, as well as Third Parties, who feel aggrieved to seek assistance to rectify such problems. The Board will investigate all allegations of harassment and in those cases where unlawful harassment is substantiated, the Board will take immediate steps to end the harassment, prevent its reoccurrence, and remedy its effects. Individuals who are found to have engaged in unlawful harassment will be subject to appropriate disciplinary action.~~

~~[ ] The District will offer counseling services to any person found to have been subjected to unlawful harassment, and where appropriate, the person(s) who committed the unlawful harassment.~~

##### **Other Violations of the Anti-Harassment Policy**

~~The Board will also take immediate steps to impose disciplinary action on individuals engaging in any of the following prohibited acts:~~

- ~~A. Retaliating against a person who has made a report or filed a complaint alleging unlawful harassment, or who has participated as a witness in a harassment investigation.~~
- ~~B. Filing a malicious or knowingly false report or complaint of unlawful harassment.~~
- ~~C. Disregarding, failing to investigate adequately, or delaying investigation of allegations of harassment, when responsibility for reporting and/or investigating unlawful harassment charges comprises part of one's supervisory duties.~~

##### **Definitions**

~~Words used in this policy shall have those meanings defined herein; words not defined herein shall be construed according to their plain and ordinary meanings.~~

~~**Complainant** is the individual who alleges, or is alleged, to have been subjected to unlawful harassment, regardless of whether the person files a formal complaint or is pursuing an informal resolution to the alleged harassment.~~

**Respondent** is the individual who has been alleged to have engaged in unlawful harassment, regardless of whether the Reporting Party files a formal complaint or is seeking an informal resolution to the alleged harassment.

**School District community** means students and Board employees (i.e., administrators and professional and support staff), as well as Board members, agents, volunteers, contractors, or other persons subject to the control and supervision of the Board.

**Third Parties** include, but are not limited to, guests and/or visitors on School District property (e.g., visiting speakers, participants on opposing athletic teams, parents), vendors doing business with or seeking to do business with the Board, and other individuals who come in contact with members of the School District community at school related events/activities (whether on or off District property).

**Day(s):** Unless expressly stated otherwise, the term "day" or "days" as used in this policy means business day(s) (i.e., a day(s) that the Board office is open for normal operating hours, Monday—Friday, excluding State recognized holidays).

### **Bullying**

Bullying rises to the level of unlawful harassment when one (1) or more persons systematically and chronically inflict physical hurt or psychological distress on one (1) or more students or employees and that bullying is based upon one (1) or more Protected Classes, that is, characteristics that are protected by Federal civil rights laws. It is defined as any unwanted and repeated written, verbal, or physical behavior, including any threatening, insulting, or dehumanizing gesture, by an adult or student that is severe or pervasive enough to create an intimidating, hostile, or offensive educational or work environment; cause discomfort or humiliation; or unreasonably interfere with the individual's school or work performance or participation; and may involve:

- A. teasing;
- B. threats;
- C. intimidation;
- D. stalking;
- E. cyberstalking;
- F. cyberbullying;
- G. physical violence;
- H. theft;
- I. sexual, religious, or racial harassment;
- J. public humiliation; or
- K. destruction of property.

**Harassment** means any threatening, insulting, or dehumanizing gesture, use of technology, or written, verbal, or physical conduct directed against a student or school employee that:

- A. places a student or school employee in reasonable fear of harm to his/her person or damage to his/her property;
- B. has the effect of substantially interfering with a student's educational performance, opportunities, or benefits, or an employee's work performance; or
- C. has the effect of substantially disrupting the orderly operation of a school.

### **Sexual Harassment**

For purposes of this policy and consistent with Title VII of the Civil Rights Act of 1964, sexual harassment is defined as:

Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when:

- A. Submission to such conduct is made either implicitly or explicitly a term or condition of an individual's employment, or status in a class, educational program, or activity.
- B. Submission or rejection of such conduct by an individual is used as the basis for employment or educational decisions affecting such individual.
- C. Such conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working, and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity.

Sexual harassment may involve the behavior of a person of any gender against a person of the same or another gender.

Sexual Harassment covered by Policy 2266—Nondiscrimination on the Basis of Sex in Education Programs or Activities is not included in this policy. Allegations of such conduct shall be addressed solely by Policy 2266.

Prohibited acts that constitute sexual harassment under this policy may take a variety of forms. Examples of the kinds of conduct that may constitute sexual harassment include, but are not limited to:

- A. Unwelcome sexual propositions, invitations, solicitations, and flirtations.
- B. Unwanted physical and/or sexual contact.
- C. Threats or insinuations that a person's employment, wages, academic grade, promotion, classroom work or assignments, academic status, participation in athletics or extra-curricular programs, activities, or events, or other conditions of employment or education may be adversely affected by not submitting to sexual advances.
- D. Unwelcome verbal expressions, including graphic sexual commentaries about a person's body, dress, appearance, or sexual activities; the unwelcome use of sexually degrading language, profanity, jokes, or innuendoes; unwelcome suggestive or insulting sounds or whistles; obscene telephone calls.
- E. Sexually suggestive objects, pictures, graffiti, videos, posters, audio recordings, or literature placed in the work or educational environment that may reasonably embarrass or offend individuals.
- F. Unwelcome and inappropriate touching, patting, or pinching; obscene gestures.
- G. Asking about, or telling about, sexual fantasies, sexual preferences, or sexual activities.
- H. Speculations about a person's sexual activities or sexual history, or remarks about one's own sexual activities or sexual history.
- I. Giving unwelcome personal gifts such as lingerie that suggest the desire for a romantic relationship.
- J. Leering or staring at someone in a sexual way, such as staring at a person's breasts, buttocks, or groin.
- K. A pattern of conduct, which can be subtle in nature, that has sexual overtones and is intended to create or has the effect of creating discomfort and/or humiliation to another.
- L. In the context of employees, consensual sexual relationships where such relationship leads to favoritism of a subordinate employee with whom the superior is sexually involved and where such favoritism adversely affects other employees or otherwise creates a hostile work environment.
- M. Inappropriate boundary invasions by a District employee or other adult member of the School District community into a student's personal space and personal life.
- N. Verbal, nonverbal, or physical aggression, intimidation, or hostility based on sex or sex stereotyping that does not involve conduct of a sexual nature.

Not all behavior with sexual connotations constitutes unlawful sexual harassment. Sex-based or gender-based conduct must be sufficiently severe, pervasive, and persistent such that it adversely affects, limits, or denies an individual's employment or education, or such that it creates a hostile or abusive employment or educational environment.

**[DRAFTING NOTE: Sexual conduct/relationships with students by District employees or any other adult member of the School District community is prohibited, and any teacher, administrator, coach, or other school authority who engages in sexual conduct with a student may also be guilty of the criminal charge of sexual battery. The issue of consent is irrelevant in regard to such criminal charge and/or with respect to the application of this policy to District employees or other adult members of the School District community.]**

### **Race/Color Harassment**

Prohibited racial harassment occurs when unwelcome physical, verbal, or nonverbal conduct is based upon an individual's race or color and when the conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working, and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity. Such harassment may occur where conduct is directed at the characteristics of a person's race or color, such as racial slurs, nicknames implying stereotypes, epithets, and/or negative references relative to racial customs.

### **Religious (Creed) Harassment**

Prohibited religious harassment occurs when unwelcome physical, verbal, or nonverbal conduct is based upon an individual's religion or creed and when the conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity. Such harassment may occur where conduct is directed at the characteristics of a person's religious tradition, clothing, or surnames, and/or involves religious slurs.

### **National Origin/Ancestry Harassment**

Prohibited national origin/ancestry harassment occurs when unwelcome physical, verbal, or nonverbal conduct is based upon an individual's national origin or ancestry and when the conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity. Such harassment may occur where conduct is directed at the characteristics of a person's national origin or ancestry, such as negative comments regarding customs, manner of speaking, language, surnames, or ethnic slurs.

### **Disability Harassment**

Prohibited disability harassment occurs when unwelcome physical, verbal, or nonverbal conduct is based upon an individual's disability and when the conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity. Such harassment may occur where conduct is directed at the characteristics of a person's disability, such as negative comments about speech patterns, movement, physical impairments or defects/appearances, or the like. Such harassment may further occur where conduct is directed at or pertains to a person's genetic information.

### **Anti-Harassment Compliance Officers**

The following individual(s) shall serve as the District's Anti Harassment Compliance Officer(s) (hereinafter, "the Compliance Officer(s)"):

**[DRAFTING NOTE: Neola suggests the Board appoint both a male and a female Compliance Officer in order to provide Complainants with the option to report their concerns to an individual of the gender with which they feel most comfortable. The same individual(s) assigned to serve as Compliance Officer(s) may also be assigned to serve as the District's Section 504 Compliance Officer(s) /ADA Coordinator(s) and/or Title IX Coordinator(s). Additionally, by appointing two (2) Compliance Officers, there should also be a Compliance Officer available to investigate a claim of harassment that pertains to the other Compliance Officer.]**

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{Name}

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\_\_\_\_\_  
{School District Title}

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\_\_\_\_\_  
{Telephone Number}

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{Office Address}

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{E-mail Address}

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{Name}

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{School District Title}

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{Office Address}

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{E-mail Address}

The name(s), title(s), and contact information of this/these individual(s) will be published annually on the District's website ( ) and:

- A. ( ) in the parent and staff handbooks.
- B. ( ) in the School District Annual Report to the public.
- C. ( ) on each individual school's website.
- D. ( ) in the School District's calendar.
- E. ( ) \_\_\_\_\_.

The Compliance Officer(s) ( ) is ( ) are [END OF OPTION] responsible for coordinating the District's efforts to comply with applicable Federal and State laws and regulations, including the District's duty to address in a prompt and equitable manner any inquiries or complaints regarding harassment.

The Compliance Officer(s) will be available during regular school/work hours to discuss concerns related to unlawful harassment, to assist students, other members of the District community, and third parties who seek support or advice when informing another individual about unwelcome conduct or to intercede informally on behalf of the individual in those instances where concerns have not resulted in the filing of a formal complaint and where all parties are in agreement to participate in an informal process.

The Compliance Officers shall accept reports of unlawful harassment directly from any member of the School District community or a Third Party or receive reports that are initially filed with an administrator, supervisor, or other District level official. Upon receipt of a report of alleged harassment, one (1) of the Compliance Officers(s) will contact the Complainant and begin either an informal or formal complaint process (depending on the request of the Complainant or the nature of the alleged harassment) or the Compliance Officer(s) will designate a specific individual to conduct such a process. The Compliance Officer(s) will provide a copy of this policy to the Complainant and Respondent. In the case of a formal complaint, the Compliance Officer(s) will prepare recommendations for the Superintendent or will oversee the preparation of such recommendations by a designee. All Board employees must report incidents of harassment that are reported to them to one (1) of the Compliance Officer(s) within two (2) days of learning of the incident.

Any Board employee who directly observes unlawful harassment is obligated, in accordance with this policy, to report such observations to one (1) of the Compliance Officer(s) within two (2) days. Additionally, any Board employee who observes an act of unlawful harassment is expected to intervene to stop the harassment, unless circumstances make such an intervention dangerous, in which case the staff member should immediately notify other Board employees and/or local law enforcement officials, as necessary, to stop the harassment. Thereafter, a Compliance Officer or designee must contact the Complainant if age eighteen (18) or older, or the Complainant's parents/guardians if the Complainant is under the age of eighteen (18), within two (2) days to advise of the Board's intent to investigate the alleged wrongdoing.

### **Reports and Complaints of Harassing Conduct**

Members of the School District community, along with Third Parties, are encouraged to promptly report incidents of harassing conduct to an administrator, supervisor, or other School District official so that the Board may address the conduct before it becomes severe, pervasive, or persistent. Any administrator, supervisor, or other District official who receives such a report shall file it with one (1) of the Compliance Officer(s) within two (2) days of receiving the report of harassment.

Members of the School District community and Third Parties who believe they have been unlawfully harassed by another member of the School District community or a Third Party are entitled to utilize the Board's complaint process that is set forth below. Initiating a complaint, whether formally or informally, will not adversely affect the Complainant's employment or participation in educational or extra-curricular programs. While there are no time limits for initiating complaints of harassment under this policy, individuals should make every effort to file a complaint as soon as possible after the conduct occurs while the facts are known and potential witnesses are available.

If, during an investigation of alleged bullying, aggressive behavior, and/or harassment in accordance with Policy 5517.01—Bullying and Other Forms of Aggressive Behavior, the Principal believes that the reported misconduct may have created a hostile work environment and may have constituted unlawful discriminatory harassment based on a Protected Class, the Principal shall report the act of bullying, aggressive behavior, and/or harassment to a Compliance Officer who shall investigate the allegation in accordance with this policy. If the alleged harassment involves Sexual Harassment as defined by Policy 2266, the matter will be handled in accordance with the grievance process and procedures outlined in Policy 2266. While the Compliance Officer investigates the allegation, or the matter is being addressed pursuant to Policy 2266, the Principal shall suspend the Policy 5517.01 investigation to await the Compliance Officer's written report or the determination of responsibility pursuant to Policy 2266. The Compliance Officer shall keep the Principal informed of the status of the Policy 1662 investigation and provide the Principal with a copy of the resulting written report. Likewise, the Title IX Coordinator will provide the Principal with the determination of responsibility that results from the Policy 2266 grievance process.

### **Investigation and Complaint Procedure (See Form 1662-F1)**

Except for Sexual Harassment that is covered by Policy 2266—Nondiscrimination on the Basis of Sex in Education Program or Activities, any employee or other member of the School District community or Third Party (e.g., visitor to the District) who believes that they have been subjected to unlawful harassment or retaliation may seek resolution of the complaint through either the procedures described below. The formal complaint process involves an investigation of the Complainant's claims of harassment or retaliation and a process for rendering a decision regarding whether the charges are substantiated.

Due to the sensitivity surrounding complaints of unlawful harassment or retaliation, timelines are flexible for initiating the complaint process; however, individuals should make every effort to file a complaint within thirty (30) days after the conduct occurs while the facts are known and potential witnesses are available. Once the formal complaint process is begun, the investigation will be completed in a timely manner (ordinarily, within fifteen (15) days of the complaint being received).

The procedures set forth below are not intended to interfere with the rights of any individual to pursue a complaint of unlawful harassment or retaliation with the United States Department of Education Office for Civil Rights and/or Equal Employment Opportunity Commission (EEOC).

### **Informal Complaint Procedure**

The goal of the informal complaint procedure is to promptly stop inappropriate behavior and to facilitate resolution through an informal means, if possible. The informal complaint procedure is provided as a less formal option for a student, other member of the School District community, or Third Party who alleges unlawful harassment or retaliation. This informal procedure is not required as a precursor to the filing of a formal complaint. The informal process is only available in those circumstances where the Complainant and the Respondent mutually agree to participate in it.

The Complainant may proceed immediately to the formal complaint process and individuals who seek resolution through the informal procedure may request that the informal process be terminated at any time to move to the formal complaint process.

All complaints involving a District employee, any other adult member of the School District community, or a Third Party and a student will be formally investigated.

As an initial course of action, if a Complainant feels comfortable and safe in doing so, the individual should tell or otherwise inform the Respondent that the allegedly harassing conduct is unwelcome and must stop. The Complainant should address the allegedly harassing conduct as soon after it occurs as possible. The Compliance Officer(s) are available to support and counsel individuals when taking this initial step or to intervene on behalf of the Complainant if requested to do so. A Complainant who is uncomfortable or unwilling to directly approach the Respondent about the allegedly inappropriate conduct may file an informal or a formal complaint. In addition, with regard to certain types of unlawful harassment, such as sexual harassment, the Compliance Officer may advise against the use of the informal complaint process.

A Complainant may make an informal complaint, either orally or in writing: 1) to a teacher, other employee, or building administrator; 2) directly to one (1) of the Compliance Officer(s); and/or 3) to the Superintendent or other District level employee.

All informal complaints must be reported to one (1) of the Compliance Officer(s) who will either facilitate an informal resolution as described below or appoint another individual to facilitate an informal resolution.

The Board's informal complaint procedure is designed to provide employees, other members of the School District community, or third parties who believe they are being unlawfully harassed with a range of options designed to bring about a resolution of their concerns. Depending upon the nature of the complaint and the wishes of the Complainant, informal resolution may involve, but not be limited to, one (1) or more of the following:

- A. Advising the Complainant about how to communicate the unwelcome nature of the behavior to the Respondent.
- B. Distributing a copy of this policy as a reminder to the individuals in the school building or office where the Respondent works or attends.
- C. If both parties agree, the Compliance Officer may arrange and facilitate a meeting or mediation between the Complainant and the Respondent to work out a mutual resolution.

While there are no set time limits within which an informal complaint must be resolved, the Compliance Officer/designee is directed to attempt to resolve all informal complaints within fifteen (15) days of receiving the informal complaint. If the Complainant is dissatisfied with the informal complaint process, the Complainant may proceed to file a formal complaint and, as stated above, either party may request that the informal process be terminated at any time to move to the formal complaint process.

### **Formal Complaint Procedure**

If a complaint is not resolved through the informal complaint process, if one of the parties has requested that the informal complaint process be terminated to move to the formal complaint process, or the Complainant, from the outset, elects to file a formal complaint, or the CO determines the allegations are not appropriate for resolution through the informal process, the formal complaint process shall be implemented.

The Complainant may file a formal complaint, either orally or in writing, with a teacher, Principal, Compliance Officer, Superintendent, or other District official. Due to the sensitivity surrounding complaints of unlawful harassment and retaliation, timelines are flexible for initiating the complaint process; however, individuals should make every effort to file a formal complaint within thirty (30) days after the conduct occurs while the facts are known and potential witnesses are available. If a Complainant informs a teacher, Principal, Superintendent, or other District official, either orally or in writing, about any complaint of harassment or retaliation, that employee must report such information to a Compliance Officer/designee within two (2) business days.

Throughout the course of the process, the Compliance Officer should keep the parties reasonably informed of the status of the investigation and the decision-making process.

All formal complaints must include the following information to the extent known: the identity of the Respondent; a detailed description of the facts upon which the complaint is based (i.e., when, where, and what occurred); a list of potential witnesses; and the resolution sought by the Complainant.

If the Complainant is unwilling or unable to provide a written statement, including the information set forth above, the Compliance Officer shall ask for such details in an oral interview. Thereafter, the Compliance Officer will prepare a written summary of the oral interview, and the Complainant will be asked to verify the accuracy of the reported charge by signing the document.

Upon receiving a formal complaint, the Compliance Officer will consider whether any action should be taken in the investigatory phase to protect the Complainant from further harassment or retaliation including, but not limited to, a change of work assignment or schedule for the Complainant and/or the Respondent. In making such a determination, the Compliance Officer should consult the Complainant to assess whether the individual agrees with the proposed action. If the Complainant is unwilling to consent to the proposed change, the Compliance Officer may still take whatever actions deemed appropriate in consultation with the Superintendent.

Within two (2) business days of receiving the complaint, the Compliance Officer/designee will initiate a formal investigation to determine whether the Complainant has been subjected to offensive conduct/harassment/retaliation. The Principal will not conduct an investigation unless directed to do so by the Compliance Officer.

Simultaneously, the Compliance Officer will inform the Respondent that a formal complaint has been received. The Respondent will be informed about the nature of the allegations and provided with a copy of any relevant policies and/or administrative guidelines, including the Board's Anti-Harassment Policy. The Respondent must also be informed of the opportunity to submit a written response to the formal complaint within five (5) days.

Although certain cases may require additional time, the Compliance Officer/designee will attempt to complete an investigation into the allegations of harassment/retaliation within fifteen (15) days of receiving the formal complaint. The investigation will include:

- A. interviews with the Complainant;
- B. interviews with the Respondent;
- C. interviews with any other witnesses who may reasonably be expected to have any information relevant to the allegations;
- D. consideration of any documentation or other information presented by the Complainant, Respondent, or any other witness that is reasonably believed to be relevant to the allegations.

At the conclusion of the investigation, the Compliance Officer/designee shall prepare and deliver a written report to the Superintendent that summarizes the evidence gathered during the investigation and provides recommendations based on the evidence and the definition of unlawful harassment as provided in Board policy and State and Federal law as to whether the Respondent engaged in unlawful harassment/retaliation of the Complainant. The Compliance Officer's recommendations must be based upon the totality of the circumstances. In determining if discriminatory harassment or retaliation occurred, a preponderance of evidence standard will be used. The Compliance Officer may consult with the Board's legal counsel before finalizing the report to the Superintendent.

Absent extenuating circumstances, within five (5) business days of receiving the report of the Compliance Officer/designee, the Superintendent must either issue a written decision regarding whether the complaint of harassment has been substantiated or request further investigation. A copy of the Superintendent's final decision will be delivered to both the Complainant and the Respondent.

If the Superintendent requests additional investigation, the Superintendent must specify the additional information that is to be gathered, and such additional investigation must be completed within five (5) business days. At the conclusion of the additional investigation, the Superintendent must issue a final written decision as described above.

The decision of the Superintendent shall be final.

**OR**

A Complainant or Respondent who is dissatisfied with the final decision of the Superintendent may appeal through a signed written statement to the Board within five (5) business days of the party's receipt of the Superintendent's decision.

In an attempt to resolve the complaint, the Board shall meet with the concerned parties and their representative within twenty (20) business days of the receipt of such an appeal. A copy of the Board's disposition of the appeal shall be sent to each party within ten (10) business days of this meeting. The decision of the Board will be final.

**[END OF OPTIONS]**

The Board reserves the right to investigate and resolve a complaint or report of unlawful harassment/retaliation regardless of whether the member of the School District community or Third Party alleging the unlawful harassment/retaliation pursues the complaint. The Board also reserves the right to have the formal complaint investigation conducted by an external person in accordance with this policy or in such other manner as deemed appropriate by the Board or its designee.

~~[ ] The parties may be represented, at their own cost, at any of the above described meetings/hearings.~~

~~The right of a person to a prompt and equitable resolution of the complaint shall not be impaired by the person's pursuit of other remedies such as the filing of a complaint with the Office for Civil Rights, the filing of charges with local law enforcement, or the filing of a civil action in court. Use of this internal complaint process is not a prerequisite to the pursuit of other remedies.~~

### **Privacy/Confidentiality**

~~The District will employ all reasonable efforts to protect the rights of the Complainant, the Respondent, and the witnesses as much as possible, consistent with the Board's legal obligations to investigate, take appropriate action, and conform with any discovery or disclosure obligations. All records generated under the terms of this policy and related administrative guidelines shall be maintained as confidential to the extent permitted by law. Confidentiality, however, cannot be guaranteed. Additionally, the Respondent must be provided with the Complainant's identity.~~

~~During the course of a formal investigation, the Compliance Officer or designee will instruct all members of the School District community and Third Parties who are interviewed about the importance of maintaining confidentiality. Any individual who is interviewed as part of a harassment investigation is expected not to disclose any information that is learned or provided during the course of the investigation.~~

### **Sanctions and Monitoring**

~~The Board shall vigorously enforce its prohibitions against unlawful harassment/retaliation by taking appropriate action reasonably calculated to stop the harassment and prevent further such harassment. While observing the principles of due process, a violation of this policy may result in disciplinary action, up to and including the discharge of an employee or the suspension/expulsion of a student. All disciplinary action will be taken in accordance with applicable State law and the terms of the relevant collective bargaining agreement(s). When imposing discipline, the Superintendent shall consider the totality of the circumstances involved in the matter. In those cases where unlawful harassment is not substantiated, the Board may consider whether the alleged conduct nevertheless warrants discipline in accordance with other Board policies, consistent with the terms of the relevant collective bargaining agreement(s).~~

~~Where the Board becomes aware that a prior remedial action has been taken against a member of the School District community, all subsequent sanctions imposed by the Board and/or Superintendent shall be reasonably calculated to end such conduct, prevent its recurrence, and remedy its effects.~~

### **Retaliation**

~~Retaliation against a person who makes a report or files a complaint alleging unlawful harassment/retaliation or participates as a witness in an investigation is prohibited. Neither the Board nor any other person may intimidate, threaten, coerce or interfere with any individual because the person opposed any act or practice made unlawful by any Federal or State civil rights law, or because that individual made a report, formal complaint, testified, assisted or participated or refused to participate in any manner in an investigation, proceeding, or hearing under those laws and/or this policy, or because that individual exercised, enjoyed, aided or encouraged any other person in the exercise or enjoyment of any right granted or protected by those laws and/or this policy.~~

~~Retaliation against a person for making a report of discrimination, filing a formal complaint, or participating in an investigation or meeting is a serious violation of this policy that can result in the imposition of disciplinary sanctions/consequences and/or other appropriate remedies.~~

~~Formal complaints alleging retaliation may be filed according to the internal complaint process set forth above.~~

~~The exercise of rights protected under the First Amendment of the United States Constitution does not constitute retaliation prohibited under this policy.~~

### **Allegations Constituting Criminal Conduct: Child Abuse/Sexual Misconduct**

~~State law requires any school teacher or school employee who knows or suspects that a child with a disability under the age of twenty one (21) or that a child under the age of eighteen (18) has suffered or faces a threat of suffering a physical or mental wound, disability or condition of a nature that reasonably indicates abuse or neglect of a child to immediately report that knowledge or suspicion to the county children's services agency. If, during the course of a harassment investigation, the Compliance Officer or a designee has reason to believe or suspect that the alleged conduct reasonably indicates abuse or neglect of the Complainant, a report of such knowledge must be made in accordance with State law and Board Policy.~~

~~Any reports made to a county children's services agency or to local law enforcement shall not terminate the Compliance Officer's or a designee's obligation and responsibility to continue to investigate a complaint of harassment. While the Compliance Officer or a designee may work cooperatively with outside agencies to conduct concurrent investigations, in no event shall the harassment investigation be inhibited by the involvement of outside agencies without good cause after consultation with the Superintendent.~~

## Education and Training

In support of this Anti Harassment Policy, the Board promotes preventative educational measures to create greater awareness of unlawful discriminatory practices. The Superintendent shall provide appropriate information to all members of the School District community related to the implementation of this policy and shall provide training for District students and staff where appropriate. All training, as well as all information provided regarding the Board's policy and harassment in general, will be age and content appropriate.

## Retention of Investigatory Records and Materials

The Compliance Officer(s) is responsible for overseeing the retention of all records that must be maintained pursuant to this policy. All individuals charged with conducting investigations under this policy shall retain all documents, electronically stored information (ESI), and electronic media (as defined in Policy 8315) created and/or received as part of an investigation which may include, but not be limited to:

- A. all written reports/allegations/complaints/grievances/statements/responses pertaining to an alleged violation of this policy;
- B. any narratives that memorialize oral reports/allegations/complaints/grievances/statements/responses pertaining to an alleged violation of this policy;
- C. any documentation that memorializes the actions taken by District personnel or individuals contracted or appointed by the Board to fulfill its responsibilities related to the investigation and/or the District's response to the alleged violation of this policy;
- D. written witness statements;
- E. narratives, notes from, or audio, video, or digital recordings of witness interviews/statements;
- F. e-mails, texts, or social media posts that directly relate to or constitute evidence pertaining to an alleged violation of this policy (i.e., not after the fact commentary about or media coverage of the incident);
- G. notes or summaries prepared contemporaneously by the investigator in whatever form made (e.g., handwritten, keyed into a computer or tablet, etc.), but not including transitory notes whose content is otherwise memorialized in other documents;
- H. written disciplinary sanctions issued to students or employees and other documentation that memorializes oral disciplinary sanctions issued to students or employees for violations of this policy;
- I. dated written determinations/reports (including summaries of relevant exculpatory and inculpatory evidence) and other documentation that memorializes oral notifications to the parties concerning the outcome of the investigation, including any consequences imposed as a result of a violation of this policy;
- J. documentation of any supportive measures offered and/or provided to the Complainant and/or the Respondent, including no contact orders issued to both parties, the dates the no contact orders were issued, and the dates the parties acknowledged receipt of the no contact orders;
- K. documentation of all actions taken, both individual and systemic, to stop the discrimination or harassment, prevent its recurrence, eliminate any hostile environment, and remedy its discriminatory effects;
- L. copies of the Board policy and/or procedures/guidelines used by the District to conduct the investigation, and any documents used by the District at the time of the alleged violation to communicate the Board's expectations to students and staff with respect to the subject of this policy (e.g., Student Code of Conduct and/or Employee Handbooks);
- M. copies of any documentation that memorializes any formal or informal resolutions to the alleged discrimination or harassment;

**[DRAFTING NOTE: The following options should be selected if the District concludes that the following items are not adequately encompassed in the preceding paragraphs.]**

- N.  documentation of any training provided to District personnel related to this policy including, but not limited to, notification of the prohibitions and expectations of staff set forth in this policy and the role and responsibility of all District personnel involved in enforcing this policy, including their duty to report alleged violations of this policy and/or conducting an investigation of an alleged violation of this policy; **[REMINDER: Documentation of training should be maintained regardless of whether there is an investigation of an alleged violation of this policy. It is best practice to maintain a log of all staff members who participate in a training, along with the date, time and location of the training, and a copy of the materials reviewed and/or presented during the training.]**
- O.  documentation that any rights or opportunities that the District made available to one party during the investigation were made available to the other party on equal terms;

~~P. ( ) copies of any notices sent to the alleged perpetrator/responding party of the allegations constituting a potential violation of this policy;~~

~~Q. ( ) copies of any notices sent to the Complainant and the Respondent in advance of any interview, meeting, or hearing;~~

~~R. ( ) copies of any documentation or evidence used during informal and formal disciplinary meetings and hearings, including the investigation report, and any written responses submitted by the Complainant or the Respondent.~~

~~The documents, ESI, and electronic media (as defined in Policy 8315) retained may include public records and records exempt from disclosure under Federal (e.g., FERPA, ADA) and/or State law — e.g., student records and confidential medical records.~~

~~The documents, ESI, and electronic media (as defined in Policy 8315) created or received as part of an investigation shall be retained in accordance with Policy 8310, Policy 8315, Policy 8320, and Policy 8330 for not less than three (3) years, but longer if required by the District's records retention schedule.~~

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Legal

20 U.S.C. 1400 et seq., The Individuals with Disabilities Education Improvement Act of 2004 (IDEIA)

29 C.F.R. Part 1635

29 U.S.C. 621 et seq, Age Discrimination in Employment Act of 1967

29 U.S.C. 794, Rehabilitation Act of 1973, as amended

42 U.S.C. 1983

42 U.S.C. 2000e et seq.

42 U.S.C. 2000ff et seq., The Genetic Information Nondiscrimination Act

42 U.S.C. 6101, The Age Discrimination Act of 1975

42 U.S.C. 12101 et seq., Americans with Disabilities Act of 1990, as amended

Titles VI and VII of the Civil Rights Act of 1964, 42 U.S.C. 2000d et seq.

Title IX of the Educational Amendments of 1972, 20 U.S.C. 1681 et seq.

The Handicappers Civil Rights Act, M.C.L. 37.1101 et seq.

The Elliott-Larsen Civil Rights Act, M.C.L. 37.2101, et seq.

Policies on Bullying, Michigan State Board of Education, 7-19-01

Model Anti-Bullying Policy, Michigan State Board of Education, 09-2006

National School Boards Association Inquiry and Analysis May 2008

**Last Modified by Wayne Wright on October 20, 2025**

Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Vol. 40, No. 1 - Nondiscrimination - September 2025 Rescind NONDISCRIMINATION BASED ON GENETIC INFORMATION OF THE EMPLOYEE
Code	po4122.02
Status	
Adopted	September 13, 2012

### **Rescind Policy - Vol. 40, No. 1**

#### **~~4122.02 — NONDISCRIMINATION BASED ON GENETIC INFORMATION OF THE EMPLOYEE~~**

~~The Board of Education prohibits discrimination on the basis of genetic information in all aspects of employment, including hiring, firing, compensation, job assignments, promotions, layoffs, training, fringe benefits, or any other terms, conditions, or privileges of employment. The Board also does not limit, segregate, or classify employees in any way that would deprive or tend to deprive them of employment opportunities or otherwise adversely affect the status of an employee as an employee, based on genetic information. Harassment of a person because of his/her genetic information is also prohibited. Likewise, retaliation against an applicant or employee for engaging in protected activity is prohibited.~~

~~In accordance with the Genetic Information Nondiscrimination Act (GINA), the Board shall not request, require, or purchase genetic information of employees, their family members, or applicants for employment. Further, in compliance with this Act, employees are directed not to provide any genetic information, including the individual's family medical history, in response to necessary requests for medical information, with the exception that family medical history may be acquired as part of the certification process for FMLA leave, when an employee is asking for leave to care for an immediate family member with a serious health condition. Applicants for employment are directed not to provide any genetic information, including the individual's family medical history, in response to requests for medical information as part of the District's application process.~~

~~[ ] The District recognizes that genetic information may be acquired through commercially and publicly available documents like newspapers, books, magazines, periodicals, television shows, or the Internet. The District prohibits, however, its employees from searching such sources with the intent of finding or obtaining genetic information or accessing sources from which they are likely to acquire genetic information.~~

~~"Genetic information," as defined by GINA, means information about: (a) an individual's genetic tests; (b) the genetic tests of that individual's family members; (c) the manifestation of disease or disorder in family members of the individual (i.e., family medical history); (d) an individual's request for, or receipt of, genetic services, or the participation in clinical research that includes genetic services by the individual or a family member of the individual; or (e) the genetic information of a fetus carried by an individual or a pregnant woman who is a family member of the individual and the genetic information of an embryo legally held by an individual or family member using assistive reproductive technology.~~

~~If the District either legally and/or inadvertently receives genetic information about an employee or applicant for employment from the employee, applicant for employment, or a medical provider it shall be treated as a confidential medical record in accordance with law.~~

~~The Superintendent shall appoint a compliance officer who shall be responsible for overseeing the District's compliance with Federal regulations and promptly dealing with any inquiries or complaints. S/He shall also verify that proper notice of nondiscrimination for Title II of the Genetic Information Nondiscrimination Act of 2008 is provided to staff members, and that all District requests for health related information (e.g., to support an employee's request for reasonable accommodation under the ADA or a request for sick leave) is accompanied by a written warning that directs the employee or health care provider not to collect or provide genetic information. The warning shall read as follows:~~

~~The Genetic Information Nondiscrimination Act of 2008 (GINA) prohibits employers and other entities covered by GINA Title II, including the Board of Education, from requesting or requiring genetic information of an individual or family member of the individual, except as specifically allowed by law. To comply with this law, do not provide any genetic information when responding to this request for medical information (unless the request pertains to a request for FMLA leave for purposes of caring for an~~



Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Copy of NONDISCRIMINATION AND ACCESS TO EQUAL EDUCATIONAL OPPORTUNITY
Code	po2260
Status	1st Reading
Adopted	September 13, 2012
Last Revised	March 27, 2023
Last Reviewed	March 13, 2026

## 2260 - **NONDISCRIMINATION AND ACCESS TO EQUAL EDUCATIONAL OPPORTUNITY**

Any form of discrimination or harassment can be devastating to an individual's academic progress, social relationship and/or personal sense of self-worth.

As such, the Board of Education does not discriminate on the basis of race, color, national origin, sex (including sexual orientation or gender identity), disability, age (except as authorized by law), religion, military status, ancestry, or genetic information (collectively, "Protected Classes") in its educational programs or activities.

The Board also does not discriminate on the basis of Protected Classes in its employment policies and practices as they relate to students, and does not tolerate harassment of any kind.

Equal educational opportunities shall be available to all students, without regard to the Protected Classes, age (unless age is a factor necessary to the normal operation or the achievement of any legitimate objective of the program/activity), place of residence within the boundaries of the District, or social or economic background, to learn through the curriculum offered in this District. Educational programs shall be designed to meet the varying needs of all students.

In order to achieve the aforesaid goal, the Superintendent shall:

### **A. Curriculum Content**

review current and proposed courses of study and textbooks to detect any bias based upon Protected Classes, ascertaining whether or not supplemental materials, singly or taken as a whole, fairly depict the contribution of both genders, various races, ethnic groups, etc. toward the development of human society;

### **B. Staff Training**

develop an ongoing program of in-service training for school personnel designed to identify and solve problems of bias based upon Protected Classes in all aspects of the program;

### **C. Student Access**

1. review current and proposed programs, activities, facilities, and practices to ensure that all students have equal access thereto and are not segregated on the basis of the Protected Classes in any duty, work, play, classroom, or school practice, except as may be permitted under State regulations;
2. verify that facilities are made available, in accordance with Board Policy 7510 - Use of School Facilities, for non-curricular student activities that are initiated by parents or other members of the community, including but not limited to any group affiliated with the Boy Scouts of America or any other youth group listed in Title 36 of the United States Code as a patriotic society;

This language does not prohibit the District from establishing and maintaining a single-gender school, class, or program within a school if a comparable school, class, or program is made available to students of each gender.

#### D. District Support

verify that like aspects of the District program receive like support as to staff size and compensation, purchase and maintenance of facilities and equipment, access to such facilities and equipment, and related matters;

#### E. Student Evaluation

verify that tests, procedures, or guidance and counseling materials, which are designed to evaluate student progress, rate aptitudes, analyze personality, or in any manner establish or tend to establish a category by which a student may be judged, are not differentiated or stereotyped on the basis of Protected Classes.

#### Definitions:

Words used in this policy shall have those meaning defined herein: words not defined shall be construed according to their plain and ordinary meanings.

**Complainant** is the individual who alleges, or is alleged, to have been subjected to unlawful discrimination/retaliation, regardless of whether the person files a formal complaint or is pursuing an informal resolution to the alleged discrimination/retaliation.

**Respondent** is the individual who has been alleged have engaged in unlawful discrimination/retaliation, regardless of whether the Reporting Party files a formal complaint or is seeking an informal resolution to the alleged discrimination/retaliation.

**School District community** means students and Board employees (i.e., administrators, and professional and classified staff), as well as Board members, agents, volunteers, contractors, or other persons subject to the control and supervision of the Board.

**Third Parties** include, but are not limited to, guests and/or visitors on School District property (e.g., visiting speakers, participants on opposing athletic teams, parents), vendors doing business with, or seeking to do business with, the Board, and other individuals who come in contact with members of the School District community at school-related events/activities (whether on or off District property).

**Day(s):** Unless expressly stated otherwise, the term "day" or "days" as used in this policy means a business day(s) (i.e., a day(s) that the Board office is open for normal operating hours, Monday - Friday, excluding State-recognized holidays).

#### District Compliance Officers

The Board designates the following individuals to serve as the District's "Compliance Officers" (also known as "Civil Rights Coordinators") (hereinafter referred to as the "COs").

Patrick Wolynski  
Executive Director Staff & Student Services  
248-435-8400 x1211  
800 Devillen, Royal Oak, MI 48073  
patrick.wolynski@royaloakschools.org

Katherine Abela  
Executive Director Finance and Facilities  
248-435-8400 x1232  
800 Devillen, Royal Oak, MI 48073  
katherine.abela@royaloakschools.org

The names, titles, and contact information of these individuals will be published annually on the School District's web site.

The District will accommodate the use of certified service animals when there is an established need for such supportive aid in the school environment. Certain restrictions may be applied when necessary due to allergies, health, safety, disability or other issues of those in the classroom or school environment. The goal shall be to provide all students with the same access and participation opportunities provided to other students in school. Confirmation of disability, need for a service animal to access the school programming, and current certification/training of the service animal may be required.

The COs are responsible for coordinating the District's efforts to comply with applicable Federal and State laws and regulations, including the District's duty to address in a prompt and equitable manner any inquiries or complaints regarding discrimination, retaliation or denial of equal access. The COs shall also verify that proper notice of nondiscrimination for Title II of the Americans with Disabilities Act (as amended), Title VI and VII of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973 (as amended), and the Age Discrimination Act of 1975 is provided to students, their parents, staff members, and the general public. A copy of each of the Acts and regulations on which this notice is based may be found in the CO's office.

The Superintendent shall annually attempt to identify children with disabilities, ages 0-25, who reside in the District but do not receive public education.

The Board is committed to educating (or providing for the education of) each qualified person with a disability with persons who are not disabled to the maximum extent appropriate. Generally, the District will place a person with a disability in the regular educational environment unless it is demonstrated that the education of the person in the regular environment, even with the use of supplementary aids and services cannot be achieved satisfactorily. If the Board operates a separate class or facility that is identifiable as being for persons with disabilities, the facility, program, and activities and services must be comparable to the facilities, programs, and activities and services offered to students without a disability.

In addition, the Superintendent shall establish procedures to identify students who are Limited English Proficient (LEP), including immigrant children and youth, to assess their ability to participate in District programs, and develop and administer a program that meets the English language and academic needs of these students. This program shall include procedures for student placement, services, evaluation and exit guidelines and shall be designed to provide students with effective instruction that leads to academic achievement and timely acquisition of proficiency in English. As a part of this program, the District will evaluate the progress of students in achieving English language proficiency in the areas of listening, speaking, reading and writing, on an annual basis (also see Policy 2225). The Superintendent is responsible for verifying that a concentration of students who are Limited English Proficient (LEP) in one or more programs is not the result of discrimination.

### **Reports and Complaints of Unlawful Discrimination and Retaliation**

Students and Board employees are required, and all other members of the School District community and Third Parties are encouraged to promptly report incidents of unlawful discrimination and/or retaliation to a teacher, administrator, supervisor, or other District official so that the Board may address the conduct. Any teacher, administrator, supervisor, or other District employee or official who receives such a complaint shall file it with the CO within two (2) days.

Members of the School District community, which includes students or Third Parties, who believe they have been unlawfully discriminated/retaliated against are entitled to utilize the complaint process set forth below. Initiating a complaint, whether formally or informally, will not adversely affect the Complainant's employment or participation in educational or extra-curricular programs. While there are no time limits for initiating complaints under this policy, individuals should make every effort to file a complaint as soon as possible after the conduct occurs while the facts are known and potential witnesses are available.

If, during an investigation of alleged bullying, aggressive behavior and/or harassment in accordance with Policy 5517.01 – Bullying and Other Forms of Aggressive Behavior, the Principal believes that the reported misconduct may constitute unlawful discrimination based on a Protected Class, the Principal shall report the act to one of the COs who shall investigate the allegation in accordance with this policy. While the CO investigates the allegation, the Principal shall suspend the Policy 5517.01 investigation to await the CO's written report. The CO shall keep the Principal informed of the status of the Policy 2260 investigation and provide the Principal with a copy of the resulting written report.

The COs will be available during regular school/work hours to discuss concerns related to unlawful discrimination/retaliation. COs shall accept reports of unlawful discrimination/retaliation directly from any member of the School District community or a Third Party, or receive reports that are initially filed with another Board employee. Upon receipt of a report of alleged discrimination/retaliation, the CO will contact the Complainant and begin either an informal or formal complaint process (depending on the Complainant's request and the nature of the alleged discrimination/retaliation), or the CO will designate a specific individual to conduct such a process. The CO will provide a copy of this policy to the Complainant and the Respondent any person who files a complaint. In the case of a formal complaint, the CO will prepare recommendations for the Superintendent or oversee the preparation of such recommendations by a designee. All members of the School District community must report incidents of discrimination/retaliation that are reported to them to the CO within two (2) days of learning of the incident/conduct.

Any Board employee who directly observes unlawful discrimination/retaliation of a student is obligated, in accordance with this policy, to report such observations to one of the COs within two (2) business days. Additionally, any Board employee who observes an act of unlawful discrimination/retaliation is expected to intervene to stop the misconduct, unless circumstances make such an intervention dangerous, in which case the staff member should immediately notify other Board employees and/or local law enforcement officials, as necessary, to stop the misconduct. Thereafter, the CO/designee must contact the Complainant, if age eighteen (18) or older, or the Complainant parents/guardians if the Complainant is under the age eighteen (18), within two (2) days to advise of the Board's intent to investigate the alleged wrongdoing.

### **Investigation and Complaint Procedure**

Except for sex discrimination and/or Sexual Harassment that is covered by Policy 2266 - Nondiscrimination on the Basis of Sex Education Programs or Activities, any student who alleges to have been subjected to unlawful discrimination or retaliation may seek resolution of the complaint through the procedures described below. The formal complaint procedures involve an investigation of the individual's claims of discrimination/retaliation and a process for rendering a decision regarding whether the charges are substantiated.

Due to the sensitivity surrounding complaints of unlawful discrimination or retaliation, timelines are flexible for initiating the complaint process; however, individuals are encouraged to file a complaint within thirty (30) days after the conduct occurs. Once the formal complaint process is begun, the investigation will be completed in a timely manner (ordinarily, within fifteen (15) days of the complaint being received).

The procedures set forth below are not intended to interfere with the rights of a student to pursue a complaint of unlawful discrimination or retaliation with the **U.S. Department of Education, Office for Civil Rights, Lyndon Baines Johnson Department of Education Building, 400 Maryland Ave., SW, Washington, DC 20202-1100, Telephone: (800) 421-3481, FAX: (202) 453-6012, TDD:**

## **Informal Complaint Procedure**

The goal of the informal complaint procedure is to promptly stop inappropriate behavior and facilitate resolution through an informal means, if possible. The informal complaint procedure is provided as a less formal option for a student who alleges unlawful discrimination or retaliation. This informal procedure is not required as a precursor to the filing of a formal complaint.

The informal process is only available in those circumstances where the Complainant and the Respondent mutually agree to participate in it.

The Complainant may proceed immediately to the formal complaint process and individuals who participate in the informal procedure may request that the informal process be terminated at any time to move to the formal complaint process.

All complaints involving a District employee or any other adult member of the School District community and a student will be formally investigated.

As an initial course of action, if a Complainant feels comfortable and safe doing so, the individual should tell or otherwise inform the Respondent that the allegedly discriminatory/retaliatory conduct is inappropriate and must stop. The Complainant should address the alleged misconduct as soon after it occurs as possible. The COs are available to support and counsel the Complainant when taking this initial step or to intervene on behalf of the individual if requested to do so. A Complainant who is uncomfortable or unwilling to directly approach the Respondent about the inappropriate conduct may file an informal or a formal complaint. In addition, with regard to certain types of unlawful discrimination (e.g., sex discrimination), the CO may advise against the use of the informal complaint process.

A Complainant who alleges unlawful discrimination/retaliation may make an informal complaint, either orally or in writing: (1) to a teacher, other employee, or building administrator in the school the student attends; (2) to the Superintendent or other District-level employee; and/or (3) directly to one of the COs.

All informal complaints must be reported to one of the COs who will either facilitate an informal resolution as described below, or appoint another individual to facilitate an informal resolution.

The School District's informal complaint procedure is designed to provide the Complainant with a range of options aimed at bringing about a prompt resolution of their concerns. Depending upon the nature of the complaint and the Complainant's wishes, informal resolution may involve, but not be limited to, one or more of the following:

- A. Advising the Complainant about how to communicate concerns to the Respondent.
- B. Distributing a copy of Policy 2260 – Non-Discrimination and Access to Equal Educational Opportunity to the individuals in the school building or office where the Respondent works or attends.
- C. If both parties agree, the CO may arrange and facilitate a meeting or mediation between the Complainant and the Respondent to work out a mutual resolution.

While there are no set time limits within which an informal complaint must be resolved, the CO or designee is directed to attempt to resolve all informal complaints within fifteen (15) days of receiving the informal complaint. If the Complainant is dissatisfied with the informal complaint process, the Complainant may proceed to file a formal complaint, and, as stated above, either party may request that the informal process be terminated at any time to move to the formal complaint process.

## **Formal Complaint Procedure**

If a complaint is not resolved through the informal complaint process, if one (1) of the parties requested that the informal complaint process be terminated to move to the formal complaint process, or if the Complainant, from the outset, elects to file a formal complaint, or the Compliance Officer(s) determines the allegations are not appropriate for resolution through the informal process, the formal complaint process shall be implemented.

The Complainant may file a formal complaint, either orally or in writing, with a teacher, Principal, or other District official at the student's school, the CO, Superintendent, or another District official who works at another school or at the District level. Due to the sensitivity surrounding complaints of unlawful discrimination, timelines are flexible for initiating the complaint process; however, individuals should make every effort to file a formal complaint within thirty (30) days after the conduct occurs. If a Complainant informs a teacher, Principal, or other District official at the student's school, Superintendent, or other District employee, either orally or in writing, about any complaint of discrimination/retaliation, that employee must report such information to the CO/designee within two (2) days.

Throughout the course of the process, the CO should keep the parties reasonably informed of the status of the investigation and the decision-making process.

All formal complaints must include the following information to the extent known: the identity of the Respondent; a detailed description of the facts upon which the complaint is based (i.e., when, where, and what occurred); a list of potential witnesses; and the resolution sought by the Complainant.

If the Complainant is unwilling or unable to provide a written statement including the information set forth above, the CO shall ask for such details in an oral interview. Thereafter, the CO will prepare a written summary of the oral interview, and the Complainant will be asked to verify the accuracy of the reported charge by signing the document.

Upon receiving a formal complaint, the CO will consider whether any action should be taken in the investigatory phase to protect the Complainant from further discrimination or retaliation, including, but not limited to, a change of work assignment or schedule for the Complainant and/or the Respondent. In making such a determination, the CO should consult the Complainant to assess whether the individual agrees with the proposed action. If the Complainant is unwilling to consent to the proposed change, the CO may still take whatever actions deemed appropriate in consultation with the Superintendent.

Within two (2) days of receiving the complaint, the CO or designee will initiate a formal investigation to determine whether the Complainant has been subjected to unlawful discrimination/retaliation. The Principal will not conduct an investigation unless directed to do so by the CO.

Simultaneously, the CO will inform the Respondent that a formal complaint has been received. The Respondent will be informed about the nature of the allegations and provided with a copy of any relevant policies and/or administrative guidelines, including Policy 2260 - Nondiscrimination and Access to Equal Educational Opportunity. The Respondent must also be informed of the opportunity to submit a written response to the formal complaint within five (5) days.

Although certain cases may require additional time, the CO or designee will attempt to complete an investigation into the allegations of discrimination/retaliation within fifteen (15) days of receiving the formal complaint. The investigation will include:

- A. interviews with the Complainant;
- B. interviews with the Respondent;
- C. interviews with any other witnesses who may reasonably be expected to have any information relevant to the allegations;
- D. consideration of any documentation or other information presented by the Complainant, Respondent, or any other witness that is reasonably believed to be relevant to the allegations.

At the conclusion of the investigation, the CO/designee shall prepare and deliver a written report to the Superintendent that summarizes the evidence gathered during the investigation and provides recommendations based on the evidence and the definition of unlawful discrimination/retaliation as provided in Board policy and State and Federal law as to whether the Respondent has engaged in unlawful discrimination/retaliation of the Complainant. The CO's recommendations must be based upon the totality of the circumstances. In determining if unlawful discrimination or retaliation occurred, a preponderance of evidence standard will be used. The CO may consult with the Board's legal counsel before finalizing the report to the Superintendent.

Absent extenuating circumstances, within five (5) business days of receiving the report of the CO or designee, the Superintendent must either issue a written decision regarding whether the charges have been substantiated or request further investigation. A copy of the Superintendent's final decision will be delivered to both the Complainant and the Respondent.

If the Superintendent requests additional investigation, the Superintendent must specify the additional information that is to be gathered, and such additional investigation must be completed within five (5) days. At the conclusion of the additional investigation, the Superintendent shall issue a final written decision as described above.

If the Superintendent determines the Respondent engaged in unlawful discrimination/retaliation toward the Complainant, the Superintendent must identify what corrective action will be taken to stop, remedy, and prevent the recurrence of the discrimination/retaliation. The corrective action should be reasonable, timely, age-appropriate and effective, and tailored to the specific situation.

The decision of the Superintendent shall be final.

The Board reserves the right to investigate and resolve a complaint or report of unlawful discrimination/retaliation regardless of whether the student alleging the unlawful discrimination/retaliation pursues the complaint. The Board also reserves the right to have the formal complaint investigation conducted by an external person in accordance with this policy or in such other manner as deemed appropriate by the Board or its designee.

The right of a person to a prompt and equitable resolution of the complaint shall not be impaired by the person's pursuit of other remedies such as the filing of a complaint with the Office for Civil Rights, the filing of charges with local law enforcement, or the filing of a civil action in court. Use of this internal complaint process is not a prerequisite to the pursuit of other remedies.

## **Privacy/Confidentiality**

The District will employ all reasonable efforts to protect the rights of the Complainant, the Respondent(s), and the witnesses as much as possible, consistent with the Board's legal obligations to investigate, to take appropriate action, and to conform with any discovery or disclosure obligations. All records generated under the terms of this policy shall be maintained as confidential to the extent permitted by law. Confidentiality, however, cannot be guaranteed. Additionally, the Respondent must be provided the Complainant's identity.

During the course of a formal investigation, the CO or designee will instruct each person who is interviewed about the importance of maintaining confidentiality. Any individual who is interviewed as part of an investigation is expected not to disclose to third parties any information that is learned or provided during the course of the investigation.

### **Sanctions and Monitoring**

The Board shall vigorously enforce its prohibitions against unlawful discrimination/retaliation by taking appropriate action reasonably calculated to stop and prevent further misconduct. While observing the principles of due process, a violation of this policy may result in disciplinary action up to and including the discharge of an employee or the suspension/expulsion of a student. All disciplinary action will be taken in accordance with applicable State law and the terms of the relevant collective bargaining agreement(s). When imposing discipline, the Superintendent shall consider the totality of the circumstances involved in the matter, including the ages and maturity levels of those involved. In those cases where unlawful discrimination/retaliation is not substantiated, the Board may consider whether the alleged conduct nevertheless warrants discipline in accordance with other Board policies, consistent with the terms of the relevant collective bargaining agreement(s).

Where the Board becomes aware that a prior remedial action has been taken against a member of the School District community, all subsequent sanctions imposed by the Board and/or Superintendent shall be reasonably calculated to end such conduct, prevent its reoccurrence, and remedy its effects.

### **Retaliation**

Retaliation against a person who makes a report or files a complaint alleging unlawful harassment/retaliation or participates as a witness in an investigation is prohibited. Neither the Board nor any other person may intimidate, threaten, coerce or interfere with any individual because the person opposed any act or practice made unlawful by any Federal or State civil rights law, or because that individual made a report, formal complaint, testified, assisted or participate or refused to participate in any manner in an investigation, proceeding, or hearing under those laws and/or this policy, or because that individual exercised, enjoyed, aided or encouraged any other person in the exercise or enjoyment of any right granted or protected by those laws and/or this policy.

Retaliation against a person for making a report of discrimination, filing a formal complaint, or participating in an investigation or meeting is a serious violation of this policy that can result in imposition of disciplinary sanctions/consequences and/or other appropriate remedies.

Formal complaints alleging retaliation may be filed according to the internal complaint process set forth above.

The exercise of rights protected under the First Amendment of the United States Constitution does not constitute retaliation prohibited under this policy.

### **Education and Training**

In support of this policy, the Board promotes preventative educational measures to create greater awareness of unlawful discriminatory practices. The Superintendent shall provide appropriate information to all members of the School District community related to the implementation of this policy and shall provide training for District students and staff where appropriate. All training, as well as all information, provided regarding the Board's policy and discrimination in general, will be age and content appropriate.

The District will endeavor to assist the student and/or the student's his/her parents in their access to District programs by providing notices to the parents and students in a language and format that they are likely to understand.

Materials approved by the State Department of Education describing the benefits of instruction in Braille reading and writing shall be provided to each blind student's individualized planning committee. The District shall not deny a student the opportunity for instruction in Braille, reading, and writing solely because the student has some remaining vision.

### **Retention of Investigatory Records and Materials**

The Compliance Officer(s) is responsible for overseeing retention of all records that must be maintained pursuant to this policy. All individuals charged with conducting investigations under this policy must retain all information, documents, electronically stored information, and electronic media (as defined in Policy 8315) created and received as part of an investigation, which may include, but not be limited to:

- A. all written reports/allegations/complaints/grievances/statements/responses pertaining to an alleged violation of this policy;
- B. any narratives that memorialize oral reports/allegations/complaints/grievances/statements/responses pertaining to an alleged violation of this policy;

- C. any documentation that memorializes the actions taken by District personnel or individuals contracted or appointed by the Board to fulfill its responsibilities related to the investigation and/or the District's response to the alleged violation of this policy;
- D. written witness statements;
- E. narratives, notes from, or audio, video, or digital recordings of witness interviews/statements;
- F. e-mails, texts, or social media posts that directly relate to or constitute evidence pertaining to an alleged violation of this policy (i.e., not after-the-fact commentary about or media coverage of the incident);
- G. notes or summaries prepared contemporaneously by the investigator in whatever form made (e.g., handwritten, keyed into a computer or tablet, etc.), but not including transitory notes whose content is otherwise memorialized in other documents;
- H. written disciplinary sanctions issued to students or employees and other documentation that memorializes oral disciplinary sanctions issued to students or employees for violations of this policy;
- I. dated written determinations/reports (including summaries of relevant exculpatory and inculpatory evidence) and other documentation that memorializes oral notifications to the parties concerning the outcome of the investigation, including any consequences imposed as a result of a violation of this policy;
- J. documentation of any supportive measures offered and/or provided to the Complainant and/or the Respondent including no contact orders issued to both parties, the dates the no contact orders were issued, and the dates the parties acknowledged receipt of the no contact orders;
- K. documentation of all actions taken, both individual and systemic, to stop the discrimination or harassment, prevent its recurrence, eliminate any hostile environment, and remedy its discriminatory effects;
- L. copies of the Board policy and/or procedures/guidelines used by the District to conduct the investigation, and any documents used by the District at the time of the alleged violation to communicate the Board's expectations to students and staff with respect to the subject of this policy (e.g., Student Code of Conduct and/or Employee Handbooks);
- M. copies of any documentation that memorializes any formal or informal resolutions to the alleged discrimination or harassment.

The information, documents, ESI, and electronic media (as defined in Policy 8315) retained may include public records and records exempt from disclosure under Federal and/or State law (e.g., student records).

These investigative records and materials created or received as part of an investigation shall be retained in accordance with Policy 8310, Policy 8315, Policy 8320, and Policy 8330 for not less than three (3) years, but longer if required by the District's records retention schedule.

Revised 3/14/13  
 Revised 7/10/14  
 Revised 11/12/15  
 Revised 2/14/19  
 Revised 6/10/21  
 Revised 12/8/22  
 T.C. 3/27/23

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Legal	M.C.L. 380.1146, 380.1704, 37.1101 et seq., 37.2402, 37.1402, 37.2101-37.2804
	20 U.S.C. Section 1681, Title IX of Education Amendments Act
	20 U.S.C. Section 1701 et seq., Equal Educational Opportunities Act of 1974
	20 U.S.C. Section 7905, Boy Scouts of America Equal Access Act
	29 C.F.R. Part 1635
	29 U.S.C. Section 794, Rehabilitation Act of 1973, as amended
	34 C.F.R. Part 110 (7/27/93)
	42 U.S.C. Section 2000 et seq., Civil Rights Act of 1964
	42 U.S.C. Section 2000ff et seq., The Genetic Information Nondiscrimination Act
	42 U.S.C. 6101 et seq., Age Discrimination Act of 1975
	42 U.S.C. 12101 et seq., The Americans with Disabilities Act of 1990, as amended

Fourteenth Amendment, U.S. Constitution

Vocational Education Program Guidelines for Eliminating Discrimination and Denial of Services, Department of Education, Office of Civil Rights, March 1979

**Last Modified by Jennifer Perkins on March 17, 2026**

Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Vol. 40, No. 1 - Nondiscrimination - September 2025 Rescind NONDISCRIMINATION BASED ON GENETIC INFORMATION OF THE EMPLOYEE
Code	po3122.02
Status	
Adopted	September 13, 2012

### **Rescind Policy - Vol. 40, No. 1**

#### **~~3122.02 — NONDISCRIMINATION BASED ON GENETIC INFORMATION OF THE EMPLOYEE~~**

~~The Board of Education prohibits discrimination on the basis of genetic information in all aspects of employment, including hiring, firing, compensation, job assignments, promotions, layoffs, training, fringe benefits, or any other terms, conditions, or privileges of employment. The Board also does not limit, segregate, or classify employees in any way that would deprive or tend to deprive them of employment opportunities or otherwise adversely affect the status of an employee as an employee, based on genetic information. Harassment of a person because of his/her genetic information is also prohibited. Likewise, retaliation against an applicant or employee for engaging in protected activity is prohibited.~~

~~In accordance with the Genetic Information Nondiscrimination Act (GINA), the Board shall not request, require or purchase genetic information of employees, their family members, or applicants for employment. Further, in compliance with this Act, employees are directed not to provide any genetic information, including the individual's family medical history, in response to necessary requests for medical information, with the exception that family medical history may be acquired as part of the certification process for FMLA leave, when an employee is asking for leave to care for an immediate family member with a serious health condition. Applicants for employment are directed not to provide any genetic information, including the individual's family medical history, in response to requests for medical information as part of the District's application process.~~

~~[ ] The District recognizes that genetic information may be acquired through commercially and publicly available documents like newspapers, books, magazines, periodicals, television shows, or the Internet. The District prohibits, however, its employees from searching such sources with the intent of finding or obtaining genetic information or accessing sources from which they are likely to acquire genetic information.~~

~~"Genetic information," as defined by GINA, means information about: (a) an individual's genetic tests; (b) the genetic tests of that individual's family members; (c) the manifestation of disease or disorder in family members of the individual (i.e., family medical history); (d) an individual's request for, or receipt of, genetic services, or the participation in clinical research that includes genetic services by the individual or a family member of the individual; or (e) the genetic information of a fetus carried by an individual or a pregnant woman who is a family member of the individual and the genetic information of an embryo legally held by an individual or family member using assistive reproductive technology.~~

~~If the District either legally and/or inadvertently receives genetic information about an employee or applicant for employment from the employee, applicant for employment, or a medical provider it shall be treated as a confidential medical record in accordance with law.~~

~~The Superintendent shall appoint a compliance officer who shall be responsible for overseeing the District's compliance with Federal regulations and promptly dealing with any inquiries or complaints. S/He shall also verify that proper notice of nondiscrimination for Title II of the Genetic Information Nondiscrimination Act of 2008 is provided to staff members and that all District requests for health related information (e.g., to support an employee's request for reasonable accommodation under the ADA or a request for sick leave) is accompanied by a written warning that directs the employee or health care provider not to collect or provide genetic information. The warning shall read as follows:~~

~~The Genetic Information Nondiscrimination Act of 2008 (GINA) prohibits employers and other entities covered by GINA Title II, including the Board of Education, from requesting or requiring genetic information of an individual or family member of the individual, except as specifically allowed by law. To comply with this law, do not provide any genetic information when responding to this request for medical information (unless the request pertains to a request for FMLA leave for purposes of caring for an~~



Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Vol. 40, No. 1 - Nondiscrimination - September 2025 Replacement NONDISCRIMINATION, EQUAL EMPLOYMENT OPPORTUNITY, AND ANTI-HARASSMENT
Code	po3122
Status	1st Reading
Adopted	September 13, 2012
Last Revised	March 27, 2023
Last Reviewed	March 13, 2026

### **Replacement Policy - Vol. 40, No. 1**

#### **3122 - NONDISCRIMINATION, EQUAL EMPLOYMENT OPPORTUNITY, AND ANTI-HARASSMENT**

The Board of Education does not discriminate on the basis of race, color, national origin, sex (including pregnancy, childbirth, and related medical conditions; sexual orientation; and gender identity), disability, age, religion, height, weight, marital or family status, military status, ancestry, genetic information, or any other legally protected category (collectively, Protected Classes) in its programs and activities, including employment opportunities.

The Board is committed to providing a work environment that is free from Prohibited Conduct, responding promptly and effectively when it has knowledge of conduct that reasonably may constitute Prohibited Conduct, and addressing Prohibited Conduct in its education programs or activities. This commitment applies to all District operations and this policy applies to Prohibited Conduct occurring within or as a part of the District's education programs and activities, whether on school property or at another location during an activity sponsored by the Board.

Persons who commit Prohibited Conduct are subject to the full range of disciplinary sanctions set forth in this policy.

The Board will provide persons who have experienced Prohibited Conduct with ongoing remedies as reasonably necessary to restore or preserve access to the District's education programs or activities.

All school employees share responsibility for avoiding, discouraging, and reporting any form of Prohibited Conduct.

The Board will take immediate action to address the following prohibited acts:

- A. Retaliating against a person who has made a report or filed a complaint alleging Prohibited Conduct, or has participated in the below-described grievance procedures.
- B. Filing a malicious or knowingly false report or complaint of Prohibited Conduct.
- C. Disregarding, failing to appropriately address, or delaying action to appropriately address allegations of Prohibited Conduct when responsibility for reporting and/or investigating such charges comprises part of one's administrative/supervisory duties.

#### **Definitions:**

Words used in this policy shall have those meanings defined herein; words not defined herein shall be construed according to their plain and ordinary meanings.

**Bullying** means: any unwanted and repeated written, verbal, or physical behavior, including any threatening, insulting, or dehumanizing gesture, by an adult, that is sufficiently severe or pervasive to create an intimidating, hostile, or offensive work environment; or unreasonably interfere with the individual's work performance or participation. It may involve: (a) threats; (b) intimidation; (c) stalking; (d) cyberstalking; (e) cyberbullying; (f) physical violence; (g) theft; (h) sexual, religious, or racial harassment; (i) public humiliation; or (j) destruction of property. Bullying rises to the level of unlawful harassment when one (1) or

more persons systematically and chronically inflict physical hurt or psychological distress on one (1) or more employees, and that bullying is based upon one (1) or more Protected Classes, that is, characteristics that are protected by Federal and/or State civil rights laws. Ordinary teasing, horseplay, arguments, and peer conflict do not constitute bullying for purposes of this policy.

**Complainant** means: an employee who is alleged to have been subjected to conduct that could constitute Prohibited Conduct; or a person, other than an employee, who is alleged to have been subjected to conduct that could constitute Prohibited Conduct and who was participating or attempting to participate in the District's education programs or activities at the time of the alleged Prohibited Conduct.

**Complaint** means: an oral or written request to the District that objectively can be understood as a request for the District to investigate and make a determination about alleged Prohibited Conduct.

**Day(s)**: Unless expressly stated otherwise, the term "day" or "days" as used in this policy means business day(s) (i.e., days that the Board office is open for normal operating hours, Monday – Friday, excluding State-recognized holidays).

**Disciplinary sanctions** means: consequences imposed on a respondent following a determination that the respondent engaged in Prohibited Conduct.

**Education programs or activities** refer to: all the District's operations including, but not limited to, in-person and online/remote educational instruction, employment, extracurricular activities, athletics, performances, and community engagement and outreach programs. The term applies to all programs and activities operated by the Board on school grounds or on other property owned or occupied by the Board. It also includes events and circumstances that take place off school property/grounds but over which the District asserts disciplinary authority (e.g., at off-campus activities sponsored by the Board).

**Exculpatory evidence** means: evidence that is favorable to a respondent because it helps excuse, justify, or absolve a respondent of alleged wrongdoing and tends to establish that a respondent did not engage in Prohibited Conduct.

**Genetic information** means: information about: (a) an individual's genetic tests; (b) the genetic tests of that individual's family members; (c) the manifestation of disease or disorder in family members of the individual (i.e., family medical history); (d) an individual's request for, or receipt of, genetic services, or the participation in clinical research that includes genetic services by the individual or a family member of the individual; or (e) the genetic information of a fetus carried by an individual or a pregnant woman who is a family member of the individual and the genetic information of an embryo legally held by an individual or family member using assistive reproductive technology.

**Harassment** means: any threatening, insulting, or dehumanizing gesture, use of technology, or written, verbal, or physical conduct directed against an employee that (a) places the employee in reasonable fear of harm to their person or damage to their property; (b) has the effect of substantially interfering with the employee's work performance; or (c) has the effect of substantially disrupting the orderly operation of a school. Each of the following types of harassment involves unwelcome physical, verbal, or nonverbal conduct that is based upon an individual's protected characteristic(s) and has the purpose or effect of interfering with the individual's work performance or creating an intimidating, hostile, or offensive work environment.

- A. **Age Harassment** means: harassment based on negative perceptions about older workers. It also includes harassment based on stereotypes about older workers, even if they are not motivated by animus, such as pressuring an older employee to transfer to a job that is less technology-focused because of the perception that older workers are not well-suited to such work or encouraging an older employee to retire.
- B. **Disability Harassment** means: harassment based upon a person's disability and includes harassment based upon stereotypes about individuals with disabilities in general or about an individual's particular disability. It also includes harassment based on traits or characteristics linked to an individual's disability, such as how the person speaks, looks, or moves. For example, negative comments about an individual's speech patterns, movement, physical impairments, or defects/appearances, or the like. Disability-based harassment includes: (a) harassment because an individual requests or receives reasonable accommodation; (b) harassment because an individual is regarded as having an impairment, even if the individual does not have an actual disability, or a record of disability; (c) harassment because an individual has a record of a disability, even if the individual currently does not have a disability; and (d) harassment based on the disability of an individual with whom the employee is associated. Finally, disability-based harassment may occur where conduct is directed at or pertains to a person's genetic information.
- C. **National Origin/Ancestry Harassment** means: harassment due to a person's (or their ancestor's) place of origin. Such harassing conduct can include ethnic slurs or epithets, derogatory comments about individuals of a particular nationality, and use of stereotypes about a person's national origin. Additionally, it can include harassment regarding traits or characteristics linked to an individual's national origin, such as physical characteristics, ethnic or cultural characteristics or customs (e.g., surnames, attire, or diet), or linguistic characteristics (e.g., a person's manner of speaking, non-English language accent, or a lack of fluency in English).
- D. **Race/Color Harassment** means: unwelcome physical, verbal, or nonverbal conduct that is based upon an individual's race or color and has the purpose or effect of interfering with the individual's work performance; or creating an intimidating, hostile, or offensive work environment. Such harassment may occur where conduct is directed at the characteristics of a person's race or color, such as racial slurs, nicknames implying stereotypes, epithets, and/or negative references relative to racial customs.

E. **Religious (Creed) Harassment** means: harassment based on a person's surname, religion (including atheism or lack of religious belief), religious traditions and practices, or religious dress/clothing, and includes making offensive comments about the same. It also includes religious slurs or epithets, harassing conduct based on religious stereotypes, and harassment associated with a person's request for and/or receipt of religious accommodation. Religious harassment also involves explicitly or implicitly coercing an employee to engage in religious practices at work.

F. **Sexual Harassment** means (for purposes of this policy and consistent with Title VII of the Civil Rights Act of 1964): unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when: (a) submission to such conduct is made either implicitly or explicitly a term or condition of an individual's employment; (b) submission or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual; or (c) such conduct has the purpose or effect of interfering with the individual's work performance; or creating an intimidating, hostile, or offensive working environment. Sexual harassment may involve the behavior of a person of any gender against a person of the same or another gender.

1. Sexual Harassment covered by Policy 2266 - Nondiscrimination on the Basis of Sex in Education Programs or Activities is not included in this policy. Allegations of such conduct shall be addressed solely by Policy 2266.
2. Prohibited acts that constitute sexual harassment under this policy may take a variety of forms. Examples of the kinds of conduct that may constitute sexual harassment include, but are not limited to:
  - a. Conduct of a sexualized nature, such as unwanted conduct expressing sexual attraction or involving sexual activity (e.g., unwelcome sexual propositions, invitations, solicitations, and flirtations; unwanted physical and/or sexual contact, including unwelcome and inappropriate touching, patting, or pinching ( **x** ); and obscene gestures [**END OF OPTION**]).
  - b. Sexual attention or sexual coercion, such as demands or pressure for sexual favors (e.g., threats or insinuations that a person's employment, wages, or other conditions of employment may be adversely affected by not submitting to sexual advances; giving unwelcome personal gifts such as lingerie that suggest the desire for a romantic relationship; leering or staring at someone in a sexual way, such as staring at a person's breasts, buttocks, or groin).
  - c. Rape, sexual assault, or other acts of sexual violence.
  - d. Discussing or displaying visual depictions of sex acts or sexual remarks (e.g., unwelcome verbal expressions of a sexual nature, including graphic sexual commentaries about a person's body, dress, appearance, or sexual activities; the unwelcome use of sexually degrading language, profanity, jokes or innuendoes; unwelcome suggestive or insulting sounds or whistles; obscene telephone calls, texts, etc.; sexually suggestive objects, pictures, graffiti, videos, posters, audio recordings or literature placed in the work environment; asking or telling about sexual fantasies, sexual preferences, or sexual activities; speculations about a person's sexual activities or sexual history, or remarks about one's own sexual activities or sexual history).
  - e. A consensual sexual relationship where such relationship leads to favoritism of a subordinate employee with whom the superior is sexually involved and where such favoritism adversely affects other employees or otherwise creates a hostile work environment.
  - f. Verbal, nonverbal, or physical aggression, intimidation, or hostility based on sex or sex-stereotyping that does not involve conduct of a sexual nature.
  - g. Non-sexual conduct based on sex, such as sex-based epithets; sexist comments (such as remarks that women do not belong in management or that men do not belong in the nursing profession); or facially sex-neutral offensive conduct motivated by sex (such as bullying directed toward employees of one sex).
  - h. Harassment based on pregnancy, childbirth, or related medical condition, which may include issues pertaining to lactation, using or not using contraception, or deciding whether to have, or not to have, an abortion.

Not all behavior with sexual connotations constitutes unlawful sexual harassment. Sex-based or gender-based conduct must be objectively offensive (a reasonable person would find it hostile or abusive), subjectively offensive (the complainant actually perceived it as abusive), and either sufficiently severe (a single extremely serious incident) or pervasive (a pattern of behavior), such that it adversely affects, limits, or denies an individual's employment, or creates a hostile or abusive employment environment.

**Inculpatory evidence** means: evidence that links a respondent to alleged wrongdoing and tends to establish a respondent engaged in Prohibited Conduct (i.e., has culpability).

**Military status** means: a person's past, current, or future membership, service, or obligation in a uniformed service (e.g., Army, Marine Corps, Navy, Air Force, Space Force, Coast Guard, Public Health Service Commissioned Corps, and National Oceanic and Atmospheric Administration Commissioned Officer Corps). Service in the uniformed services also means the performance of duty, on a voluntary basis, or involuntary basis, in a uniformed service, under competent authority, and includes active duty, active duty for training, initial active duty for training, inactive duty for training, and full-time National Guard duty. It further includes the period of time for which a person is absent from employment for the purpose of an examination to determine the fitness of the person to perform any such duty as listed above.

**Party** means: a complainant or respondent.

**Pregnancy, childbirth, or related medical conditions** means:

- A. "Pregnancy" and "childbirth" refer to the pregnancy or childbirth of a specific employee and include, but are not limited to, current pregnancy; past pregnancy; potential or intended pregnancy (which can include infertility, fertility treatment, and the use of contraception); labor; and childbirth (including vaginal and cesarean delivery).
- B. "Related medical conditions" are medical conditions relating to the pregnancy or childbirth of a specific employee, and may include termination of pregnancy, including via miscarriage, stillbirth, or abortion; ectopic pregnancy; preterm labor; pelvic prolapse; nerve injuries; cesarean or perineal wound infection; maternal cardiometabolic disease; gestational diabetes; preeclampsia; HELLP (hemolysis, elevated liver enzymes and low platelets) syndrome; hyperemesis gravidarum; anemia; endometriosis; sciatica; lumbar lordosis; carpal tunnel syndrome; chronic migraines; dehydration; hemorrhoids; nausea or vomiting; edema of the legs, ankles, feet, or fingers; high blood pressure; infection; antenatal (during pregnancy) anxiety, depression, or psychosis; postpartum depression, anxiety, or psychosis; frequent urination; incontinence; loss of balance; vision changes; varicose veins; changes in hormone levels; vaginal bleeding; menstruation; and lactation and conditions related to lactation, such as low milk supply, engorgement, plugged ducts, mastitis, or fungal infections. The preceding list of related medical conditions is not exhaustive.

**Prohibited Conduct** means: unlawful discrimination or harassment based on a person's Protected Class(es) or retaliation. Such misconduct involves a violation of Federal and/or State civil rights laws.

**Relevant** means: related to the allegations of Prohibited Conduct under investigation as part of the Board's grievance procedures. Questions are relevant when they seek evidence that may aid in showing whether the alleged Prohibited Conduct occurred, and evidence is relevant when it may aid a decisionmaker in determining whether the alleged Prohibited Conduct occurred.

**Remedies** means: measures provided, as appropriate, to a complainant or any other person the District identifies as having had their equal access to the District's education programs or activities limited or denied by Prohibited Conduct. These measures are provided to restore or preserve that person's access to the District's education program or activity after the District determines that Prohibited Conduct occurred.

**Respondent** means: a person who is alleged to have engaged in Prohibited Conduct.

**Retaliation** means: intimidation, threats, coercion, or discrimination against any person by the District, a student, a Board employee, or any other person authorized by the Board to provide aid, benefit, or service under the District's education programs or activities, for the purpose of interfering with any right or privilege secured by Federal or State law, or because the person has reported information, made a complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing under applicable Federal or State laws or regulations.

**School District community** means: students and Board employees (i.e., administrators and professional and classified staff), as well as Board members, agents, volunteers, contractors, or other persons subject to the control and supervision of the Board.

**Supportive measures** means: non-disciplinary, non-punitive individualized services offered as appropriate, as reasonably available, without fee or charge to the complainant or the respondent before or after making a report or filing a complaint. Such measures are designed to restore or preserve that party's access to the District's education programs or activities without unreasonably burdening the other party, including measures designed to protect the safety of all parties or the District's educational environment or deter Prohibited Conduct. Supportive measures may include modifications of work schedules, mutual restrictions of contact between the parties, changes in work locations, leaves of absence, increased security and monitoring of certain work settings; training related to Prohibited Conduct, (x) referral to Employee Assistance Program, [END OF OPTION] and other similar measures.

**Third Parties** means: guests and/or visitors on District property (e.g., visiting speakers, participants on opposing athletic teams, parents), vendors doing business with, or seeking to do business with, the Board, and other individuals who come in contact with members of the School District community at school-related events/activities (whether on or off District property).

### **Pregnancy, Childbirth, and Related Medical Conditions**

The Board will not discriminate against an employee based on the person's current pregnancy, potential or intent to become pregnant, past pregnancy, or medical condition related to pregnancy or childbirth, or because the person uses birth control, or has had or not had an abortion.

Additionally, the Board will provide a reasonable accommodation to an employee's known limitation related to pregnancy, childbirth, or a related medical condition, unless the accommodation will cause the District undue hardship.

The Board will treat pregnancy, childbirth, and related medical conditions as any other temporary medical conditions for all job-related purposes, including commencement, duration, and extensions of leave; accrual of seniority and any other benefit or service; reinstatement; and under any fringe benefit offered to employees by virtue of employment.

The Board will provide reasonable break time for an employee to express breast milk while at work for the first year after the

employee's child's birth. The Board will provide the employee with a space, other than a bathroom, that is clean, shielded from view, free from intrusion from coworkers and the public, and which the employee can use as needed to express breast milk. See Board Policy 6700 – Fair Labor Standards Act.

## **Nondiscrimination Based on Employee's Genetic Information**

The Board prohibits discrimination on the basis of genetic information in all aspects of employment, including hiring, firing, compensation, job assignments, promotions, layoffs, training, fringe benefits, or any other terms, conditions, or privileges of employment. The Board also does not limit, segregate, or classify employees in any way that would deprive or tend to deprive them of employment opportunities or otherwise adversely affect the status of an employee as an employee, based on genetic information. Harassment of a person because of the individual's genetic information is also prohibited. Likewise, retaliation against an applicant or employee for engaging in protected activity is prohibited.

In accordance with the Genetic Information Nondiscrimination Act ("GINA"), the Board shall not request, require, or purchase genetic information of employees, their family members, or applicants for employment. Further, in compliance with GINA, employees are directed not to provide any genetic information, including the individual's family medical history, in response to necessary requests for medical information, with the exception that family medical history may be acquired as part of the certification process for FMLA leave, when an employee is asking for leave to care for an immediate family member with a serious health condition. Applicants for employment are directed not to provide any genetic information, including the individual's family medical history, in response to requests for medical information as part of the District's application process.

~~[ ] The District recognizes that genetic information may be acquired through commercially and publicly available documents like newspapers, books, magazines, periodicals, television shows, or the Internet. The District prohibits, however, its employees from searching such sources with the intent of finding or obtaining genetic information or accessing sources from which they are likely to acquire genetic information. [END OF OPTION]~~

If the District either legally and/or inadvertently receives genetic information about an employee or applicant for employment from the employee, applicant for employment, or a medical provider, it shall be treated as a confidential medical record in accordance with law.

The District Compliance Officer (see below) shall be responsible for overseeing the District's compliance with applicable Federal regulations and promptly dealing with any inquiries or complaints. The District Compliance Officer or designee shall also verify that proper notice of nondiscrimination for Title II of the Genetic Information Nondiscrimination Act of 2008 is provided to staff members, and that all District requests for health-related information (e.g., to support an employee's request for reasonable accommodation under the Americans with Disabilities Act ("ADA") or a request for sick leave) is accompanied by a written warning that directs the employee or health care provider not to collect or provide genetic information. The warning shall read as follows:

The Genetic Information Nondiscrimination Act of 2008 ("GINA") prohibits employers and other entities covered by GINA Title II, including the Board of Education, from requesting or requiring genetic information of an individual or family member of the individual, except as specifically allowed by law. To comply with this law, do not provide any genetic information when responding to this request for medical information (unless the request pertains to a request for FMLA leave for purposes of caring for an immediate family member with a serious health condition). "Genetic information," as defined by GINA, includes an individual's family medical history, the results of an individual's or family member's genetic test, the fact that an individual or an individual's family member sought or received genetic services or participated in clinical research that includes genetic services, and genetic information of a fetus carried by an individual or an individual's family member or an embryo lawfully held by an individual or family member receiving assistive reproductive services.

~~[ ] The District offers health services ( ), including a wellness program [END OF INTERNAL OPTION]. Participation in the services/program is voluntary. Genetic information (such as family medical history) may be obtained as part of an individual's participation in the service/program. If that occurs, individual genetic information may be provided to the individual receiving the services and to the person's health services providers, but only genetic information in aggregate form will be provided to the Board. [END OF OPTION]~~

### **District Compliance Officer(s)**

#### **[DRAFTING NOTES:**

- 1. Neola suggests the Board appoint both a male and a female to serve as the District Compliance Officers. By appointing two (2) District Compliance Officers, there should always be a District Compliance Officer available to address a claim that pertains to the other District Compliance Officer. If, however, the Board appoints more than one (1) District Compliance Officer, Neola recommends that it designate one (1) of the District Compliance Officers to retain ultimate oversight over the assigned responsibilities and ensure the Board's consistent compliance with its responsibilities under applicable Federal and State laws that prohibit unlawful discrimination/harassment based on protected classes and retaliation. Alternatively, the Board could appoint a District Compliance Officer and one (1) or more persons to assist the District Compliance Officer with performance of the responsibilities identified in this policy and its accompanying administrative guidelines. Often the person(s) designated to assist a District Compliance Officer is/are called Deputy or Assistant Compliance Officer(s). If the Board elects this alternative approach, it would designate a District Compliance Officer for purposes of this policy, and then designate the other position(s) through its AG. The person(s) in the alternative support role(s) will need to be trained in the same manner as the District Compliance Officer (see**

2. The Board must list in this policy either the Name(s) or Title(s) of the District Compliance Officer(s); while the Board may list both the Name(s) and Title(s), Neola suggests that the Board only list the Title(s) in this policy (so the Board does not need to revise/amend the policy whenever there is a change in the actual person(s) holding the designated position(s)), but list both the Name(s) and Title(s) in the requisite notices/postings (e.g., website) and publications (e.g., handbooks). The District will also need to decide whether to list the Name(s) and Title(s), or just the Title(s), in Administrative Guideline 3122 if the District elects to identify the District Compliance Officer in the AG (see DRAFTING NOTE in the AG; again, if the District lists the Name(s) and Title(s), it will need to remember to update the AG whenever there is a change in the actual person(s) holding the designated position(s). No matter what, the Board will need to amend its policy and update its AG, requisite notices/postings, and publications, whenever it changes the Title of the position(s) designated to serve as the District Compliance Officer(s).

3. Reminder: Whenever a new person begins to serve as the District Compliance Officer (or in a support role to the District Compliance Officer), the District needs to make sure the new person is appropriately trained, in a timely manner, to fulfill the responsibilities of the position to which the person is assigned.]

[END OF DRAFTING NOTES]

The Board designates and authorizes the following individual(s) to coordinate its efforts to comply with the Board’s responsibilities under Federal and State laws that prohibit discrimination, including harassment, based on Protected Classes and retaliation (also known as “Civil Rights Coordinator(s)” or “Anti-Harassment Compliance Officer(s)”) (hereinafter referred to as the “District Compliance Officer(s)” or “CO(s)”):

\_\_\_\_\_  
\_\_\_\_\_  
{Name and/or School District Title}  
\_\_\_\_\_  
\_\_\_\_\_  
{Office Address}  
\_\_\_\_\_  
\_\_\_\_\_  
{Email Address}  
\_\_\_\_\_  
\_\_\_\_\_  
{Telephone Number}

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800 Devillen, Royal Oak, MI 48073  
patrick.wolynski@royaloakschools.org

[DRAFTING NOTE: The District may want to create a static (i.e., fixed) District Compliance Officer -specific email address and phone number that will not change when the person(s) and/or position(s) designated to be the CO(s) change(s) – e.g., CO4CivilRights@(insert District’s domain) – which the Technology Director/Department can program to be forwarded to the actual individual(s) serving as the District Compliance Officer(s) at any given time. Likewise, the District may want to establish a static Telephone Number for the position of District Compliance Officer that can be forwarded to, and accessed by, the actual person(s) serving in the CO position(s) at any given time. These two (2) steps will help reduce the information that needs to be updated in policy, AG, and/or the requisite notices/postings and publications when changes occur to the specific person(s)/position(s) designated to serve as the CO(s).]

[DRAFTING NOTE: Complete the following information if the Board appoints more than one (1) District Compliance Officer.]

[DESIGNATION OF A SECOND DISTRICT COMPLIANCE OFFICER]

\_\_\_\_\_  
\_\_\_\_\_  
{Name and/or School District Title}  
\_\_\_\_\_  
\_\_\_\_\_  
{Office Address}  
\_\_\_\_\_  
\_\_\_\_\_  
{Email Address}  
\_\_\_\_\_  
\_\_\_\_\_  
{Telephone Number}

Katherine Abela  
Executive Director Finance and Facilities  
248-435-8400 x1232

**[END OF OPTION]**

**[DRAFTING NOTE: As discussed above, if the Board designates more than one (1) CO, Neola recommends that the District select the following option.]**

**[  ]** The Board designates Patrick Wolynski, Executive Director Staff & Student Services **[DRAFTING NOTE: Insert Name and/or Title of the District Compliance Officer who is ultimately responsible for the District’s compliance with its responsibilities under Federal and State laws that prohibit discrimination/harassment based on Protected Classes and retaliation]** as the individual who is ultimately responsible for oversight over the Board’s compliance with applicable Federal and State laws and regulations that prohibit discrimination based on the basis of Protected Classes and retaliation. **[END OF OPTION]**

~~**[  ]** The District Compliance Officer may delegate specific duties to one (1) or more designees. **[END OF OPTION]**~~

~~The contact information concerning the District Compliance Officer(s) will be published on the School District’s website ~~( )~~ and annually **[END OF OPTION]**:~~

- ~~A. **( )** in parent/student and staff handbooks.~~
- ~~B. **( )** in the School District Annual Report to the public.~~
- ~~C. **( )** on each individual school’s website.~~
- ~~D. **( )** in the School District’s calendar.~~
- ~~E. **( )** \_\_\_\_\_.~~

**[DRAFTING NOTE: The Board may want to select the following option when the Superintendent is not the CO. While Neola recognizes that this may not always be possible, it may be preferable to have the CO be someone other than the Superintendent because then – if the CO serves as the investigator and decisionmaker – the Superintendent can serve as the appeal decisionmaker or the facilitator for the informal resolution process.]**

**[  ]** The District Compliance Officer(s) shall report directly to the Superintendent except when the Superintendent is a party to a complaint (i.e., either the complainant or the respondent). Under such circumstances, the CO(s) shall report directly to **[SELECT ONE OF THE FOLLOWING]** ~~( ) the Board President~~ **(  )** the Board’s Legal Counsel ~~( ) \_\_\_\_\_~~ **[OTHER]** **[END OF INTERNAL OPTIONS]** until the matter in which the Superintendent is a party is concluded. **[END OF OPTION]**

Questions about this policy **(  )** and AG 3122 **[END OF OPTION]** should be directed to the District Compliance Officer(s).

The CO(s) is/are responsible for coordinating the District's efforts to comply with applicable Federal and State laws and regulations, including the District's duty to address in a prompt and equitable manner any inquiries or complaints regarding discrimination, harassment, retaliation, or denial of equal opportunity/access. The CO(s) shall also verify that proper notice of nondiscrimination for Title II of the Americans with Disabilities Act (as amended), Title VI and Title VII of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973 (as amended), Genetic Information Nondiscrimination Act (GINA), and the Age Discrimination in Employment Act of 1975 is provided to staff members and the general public. ~~**[  ]** Any sections of the District’s collective bargaining agreements dealing with hiring, promotion, demotion, discipline, and tenure need to contain a statement of nondiscrimination similar to that in the Board’s statement set forth above. **[END OF OPTION]** **[  ]** In addition, as practical, gender specific terms should be eliminated from such contracts. **[END OF OPTION]** Copies of the laws and regulations listed above are available upon request from the CO(s).~~

The CO(s) will be available during regular work hours to discuss concerns related to Prohibited Conduct, to assist employees, other members of the District community, and third parties who seek support or advice when informing another individual about Prohibited Conduct, including unwelcome conduct, or to intercede informally on behalf of the individual in those instances where concerns have not resulted in the filing of a formal complaint and where all parties are in agreement to participate in an informal process.

The CO(s) shall monitor the District’s education programs and activities for barriers to reporting information about conduct that reasonably may constitute Prohibited Conduct pursuant to Federal and/or State laws that prohibit discrimination/harassment based on the basis of a Protected Class/Category and retaliation, and take steps reasonably calculated to address such barriers.

**Notice of Nondiscrimination**

The Superintendent shall provide a notice of nondiscrimination to students, parents, guardians, or other authorized legal representatives of elementary and secondary students; employees; applicants for admission and employment; and all unions and professional organizations holding collective bargaining or professional agreements with the Board. Specifically, the Superintendent shall post the notice of nondiscrimination on the District’s website and in each handbook, catalog, announcement, bulletin, and

application form that it makes available to the persons listed above, or which are otherwise used in connection with the recruitment of employees. (x) See AG 3122 and Form 3122F1 – Notice and Statement of Nondiscrimination. [END OF OPTION]

## NOTIFICATION/REPORTS OF PROHIBITED CONDUCT

Any person may provide information to the CO(s) concerning conduct that reasonably may constitute Prohibited Conduct. Such information may be submitted in person, by mail, by telephone, or by electronic mail using the CO's(s') published contact information, or by any other means (oral or written) that results in the CO(s) receiving the information. Information may be provided at any time (including during non-work hours). ~~[ ] Anonymous reports may be submitted using ( ) the online reporting form posted at \_\_\_\_\_ [insert the web address for the reporting form, or insert a hyperlink tied to the phrase "online reporting form"] [or] ( ) the hotline reporting number ( \_\_\_\_\_ [insert phone number]). [END OF OPTION]~~

All Board employees are required to notify the CO(s) of conduct that reasonably may constitute Prohibited Conduct. For the Board to fulfill its responsibilities under applicable Federal and/or State laws, if a Board employee has knowledge of conduct that reasonably may constitute Prohibited Conduct, the Board employee must notify the/a CO within two (2) business days of learning the information or receiving the report. [DRAFTING NOTE: The applicable statutes and regulations do not specify within how many days the Board employee must notify the CO of receiving notification/a report of Prohibited Conduct; Neola suggests "two (2) days". Alternatively, the Board could make this language more open-ended – e.g., "\*\* \* \* must immediately/promptly notify the/a CO of such information or report."] The Board employee must also comply with mandatory reporting responsibilities pursuant to Policy 8462 – Student Abuse and Neglect, if applicable. If the Board employee's knowledge about the alleged Prohibited Conduct is based on another individual bringing the information to the Board employee's attention, and the reporting individual submitted a written notification/report or complaint to the Board employee, the Board employee must provide the written notification/report or complaint to the CO.

Notification can be provided orally or in writing and should be as specific as possible. The person making the notification/report should, to the extent known, identify the alleged victim(s), perpetrator(s), and witness(es), and describe in detail what occurred, including date(s), time(s), and location(s).

If a notification/report or complaint involves allegations of Prohibited Conduct by or involving the CO, the person making the report (i.e., providing the notification or filing the complaint) should submit it to the Superintendent or another Board employee who, in turn, will notify the Superintendent of the report/complaint. The Superintendent will then serve in place of the CO for purposes of addressing that report of Prohibited Conduct. [DRAFTING NOTE: If the Superintendent is the CO, substitute "Board President" in place of "Superintendent."]

When a Board employee notifies the CO of suspected Prohibited Conduct, the employee is required to report all known details about the alleged Prohibited Conduct including: (1) the name of the alleged respondent(s); (2) the person who experienced the alleged Prohibited Conduct (i.e., the complainant); (3) other persons involved in the alleged Prohibited Conduct (e.g., witnesses); and (4) any other relevant facts, such as date, time, and location. Failure to provide such notification may result in discipline, up to and including suspension or termination of employment.

Any allegations of misconduct not involving Prohibited Conduct as defined in this policy will be addressed through the procedures outlined in other Board policies (x) and/or administrative guidelines [END OF OPTION], the applicable Student Code of Conduct, applicable collective bargaining agreement, and/or Employee/Administrator Handbook.

When a notification/report or complaint of Prohibited Conduct is made, the CO shall promptly (i.e., within two (2) business days [DRAFTING NOTE: The applicable laws and/or regulations do not define "promptly" or otherwise specify within how many days the contact has to be made; Neola suggests "two (2) days."] of the CO's receipt of the notification/report or complaint of Prohibited Conduct) contact the purported complainant to discuss the availability of supportive measures, consider the complainant's wishes with respect to supportive measures, inform the complainant of the availability of supportive measures with or without the filing of a complaint, and explain to the complainant the process for filing a complaint. The CO is responsible for coordinating the effective implementation of supportive measures. Any supportive measures provided to the complainant or respondent shall be maintained as confidential, to the extent that maintaining such confidentiality will not impair the ability of the District to provide the supportive measures.

## GRIEVANCE PROCEDURES

### Overview:

The Board adopts the following grievance procedures to provide for the prompt, effective, and equitable resolution of complaints made by employees, applicants, or other individuals who are participating or attempting to participate in the District's education programs or activities (i.e., members of the School District community and Third Parties), or by the CO alleging any act of Prohibited Conduct.

These grievance procedures shall be used for all complaints of Prohibited Conduct unless it involves conduct involving a student, in which case the grievance procedures set forth in Policy 2260 or Policy 5517.01 shall apply. These grievance procedures set forth the means for investigating and resolving claims involving such Prohibited Conduct; in particular, the procedures provide a method for assessing – in a prompt, effective, and equitable manner – whether an applicable Federal or State law was violated and, if it was, how best to end the Prohibited Conduct, prevent its recurrence, and remedy its effects.

Due to the sensitivity of complaints of Prohibited Conduct, timelines are flexible for initiating the grievance procedures; however, individuals are encouraged to file a complaint within thirty (30) days after the conduct occurs. Once the formal complaint process is begun, the investigation will be completed in a timely manner.

**[DRAFTING NOTE: Title VII of the Civil Rights Act of 1964 ("Title VII") prohibits discrimination in employment. Specifically, it prohibits employment discrimination based on race, color, religion, sex, or national origin, and applies to employers with fifteen (15) or more employees. Title IX, on the other hand, specifically prohibits discrimination based on sex in education programs and activities that receive Federal financial assistance, including employment within those institutions. Title IX is addressed by Board Policy 2266 and AG 2266. While both laws aim to prevent sex-based discrimination in the workplace, Title VII applies more broadly to various types of employers, whereas Title IX is limited to educational institutions receiving Federal funds. Ultimately, both laws aim to ensure equal employment opportunities and protect individuals from discrimination. When a District Compliance Officer receives a complaint or notification of alleged misconduct involving sex discrimination (in particular, sexual harassment) that involves an employee complainant and an employee respondent, the District Compliance Officer should consult with the Title IX Coordinator and/or the Board's Legal Counsel concerning which law – it may be both – the District will need to comply with when investigating the allegations.]**

Under all circumstances, the CO shall offer and coordinate supportive measures, as appropriate, in accordance with this policy (x) and AG 3122 **[END OF OPTION]**.

### **Complaints:**

The following people may make a complaint of Prohibited Conduct – i.e., request that the District investigate and determine whether Prohibited Conduct occurred:

A. a "complainant," which includes:

1. an employee of the District who is alleged to have been subjected to conduct that could constitute Prohibited Conduct; or
2. a person other than an employee of the District who is alleged to have been subjected to conduct that could constitute Prohibited Conduct at a time when that individual was participating or attempting to participate in the District's education programs or activities;

B. an authorized legal representative with the legal right to act on behalf of a complainant;

C. the District Compliance Officer.

A person is entitled to make a complaint of unlawful harassment only if they themselves are alleged to have been subjected to the unlawful harassment, or if the CO initiates a complaint.

**[DRAFTING NOTE: This paragraph emphasizes that in order for a person to file a complaint of unlawful harassment, the person has to have been subjected to the alleged misconduct directly or be a person who has a legal right to act on behalf of the person who was subjected to the alleged misconduct. This is consistent with the prior paragraph, where the complainant is identified as an employee who was "subjected to conduct that could constitute Prohibited Conduct." The following paragraph, on the other hand, expands who can file a complaint – when the alleged Prohibited Conduct does not involve unlawful harassment, or the complaint involves allegations of retaliation – to persons who are aware of the alleged Prohibited Conduct, even if that person was not directly affected by or subject to the alleged Prohibited Conduct.]**

With respect to complaints of Prohibited Conduct other than unlawful harassment, or complaints involving allegations of retaliation, in addition to the people listed above, the following persons have a right to make a complaint:

A. any employee of the District; or

B. any person other than an employee who was participating or attempting to participate in the District's education programs or activities at the time of the alleged Prohibited Conduct.

The District may consolidate complaints of Prohibited Conduct against more than one (1) respondent, or by more than one (1) complainant against one (1) or more respondents, or by one (1) party against another party, when the allegations of Prohibited Conduct arise out of the same facts or circumstances. When more than one (1) complainant or more than one (1) respondent is involved, references below to a party, complainant, or respondent include the plural, as applicable.

A person may file criminal charges simultaneously with filing a complaint. A person does not need to wait until the District's internal grievance procedures are completed before filing a criminal complaint. Likewise, questions or complaints relating to alleged violations of applicable Federal or State laws may be filed with the U.S. Department of Education's Office for Civil Rights, the U.S. Department of Justice's Civil Rights Division, the U.S. Equal Employment Opportunity Commission, or the Michigan Department of Civil Rights, at any time based on the underlying statutory basis for the complaint.

### **Basic Requirements:**

The District will treat complainants and respondents equitably.

All persons involved with implementing the grievance procedures and any other aspects of this Policy, including the District Compliance Officer, the investigator, the decisionmaker, and the appeal decisionmaker, ~~( ) and the facilitator of the informal resolution process,~~ **[END OF OPTION]** shall be free from any conflicts of interest or bias for or against complainants or respondents generally or an individual complainant or respondent.

The CO may serve simultaneously as an investigator and/or a decisionmaker. **[END OF OPTION] [DRAFTING NOTE: Neola recommends the Board select this OPTION; note it is "may" (i.e., optional) so the CO can decide when to serve in both roles and when to designate one or more persons to perform these responsibilities in a given case.]**

If the CO does not intend to serve as the investigator/decisionmaker in a specific case, the CO shall designate one (1) or more administrators who are appropriately trained to serve in the role.

In circumstances when the CO and trained administrators do not have time/capacity to serve, or are prevented due to a conflict of interest, bias, or partiality, or other reasons impair the CO and other trained administrators from serving as an investigator/decisionmaker in a specific case, the CO shall , in consultation with ~~( ) and approval of~~ **[END OF OPTION]** the Superintendent or ~~( ) Board~~  Board President (as appropriate), **[END OF OPTION]** secure one (1) or more independent third parties to serve as the investigator and/or decisionmaker.

The District presumes that the respondent is not responsible for the alleged Prohibited Conduct until a determination is made at the conclusion of its grievance procedures.

Under ordinary circumstances, the Board expects to complete the major stages of the grievance procedures within the timeframe specified below:

A. **Evaluation** – The District Compliance Officer will determine whether to dismiss a complaint or investigate it within ten (10) business **[INSERT AMOUNT]** days of receiving the complaint. **[DRAFTING NOTE: Neola recommends that the evaluation stage be completed within ten (10) days of the CO receiving notice of the complaint.]**

B. **Investigation** – The CO, or designated investigator/decisionmaker, shall ordinarily complete the investigation (i.e., collect relevant evidence that is not otherwise impermissible) and issue a Determination (i.e., consider the relevant and not otherwise impermissible evidence and decide whether Prohibited Conduct occurred) within twenty (20) business **[INSERT AMOUNT]** days of the CO determining the charges require investigation. **[DRAFTING NOTE: Recognizing that it is important for investigations to be completed and Determinations issued in a prompt and equitable manner, Neola recommends that a school district typically complete an investigation and issue a Determination within twenty (20) days.]**

**[DRAFTING NOTE: If the investigator/decisionmaker is someone other than the CO, upon written request from the investigator/decisionmaker, the CO should be permitted to approve a reasonable extension of time for the investigation to be completed and the Determination issued. If the CO is the investigation/decisionmaker: upon written request from the CO, the Superintendent should be permitted to approve a reasonable extension of time for the investigation to be completed and the Determination issued. In either situation, the administrator granting the extension should communicate to the parties the new deadline along with a rationale for the extension.]**

If, however, the CO, or designated investigator/decisionmaker, determines that the investigation is going to take longer, the CO will so notify the parties  and the Superintendent **[END OF OPTION]** and will thereafter keep the parties  and the Superintendent **[END OF OPTION]** informed of the status of the matter on a regular **[INSERT TIME PERIOD – E.G., BIWEEKLY OR REGULAR]** basis.

C. **Appeal** – A party filing an appeal of the CO's decision to dismiss a complaint , or the Determination, **[END OF OPTION]** must do so within five (5) business **[INSERT AMOUNT]** days of receiving the Dismissal  or Determination **[END OF OPTION]**. **[DRAFTING NOTE: Neola recommends the Board allow limited appeals based on the Determination. See DRAFTING NOTE below in the appeal section.]**

The CO, or the Superintendent if the CO is the individual requesting an extension, may approve reasonable extensions of the preceding timeframes on a case-by-case basis for good cause with notice to the parties.

The District will take reasonable steps to protect the privacy of the parties and witnesses.  These steps will not restrict the ability of the parties to present evidence or otherwise participate in the grievance procedures. **[END OF OPTION]** The parties shall not engage in retaliation, including against witnesses.

The CO, or designated investigator/decisionmaker, shall objectively evaluate all evidence that is relevant and not otherwise impermissible — including both inculpatory and exculpatory evidence. Credibility determinations shall not be based on a person's status as a complainant, respondent, or witness.

The following types of evidence, and questions seeking such evidence, are impermissible (i.e., will not be accessed or considered,

except by the District to determine whether one of the exceptions listed below applies; will not be disclosed; and will not otherwise be used), regardless of whether they are relevant:

- A. evidence that is protected under a privilege recognized by Federal or State law, unless the person to whom the privilege or confidentiality is owed voluntarily waived the privilege or confidentiality; and
- B. a party's or witness's records that are made or maintained by a physician, psychologist, or other recognized professional or paraprofessional in connection with the provision of treatment to the party or witness, unless the District obtains that party's or witness's voluntary, written consent for use in its grievance procedures.

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

Upon initiation of the Board's grievance procedures, the District Compliance Officer shall notify the parties of the following:

- A. the Board's grievance procedures (  ) and informal resolution process **[END OF OPTION]** associated with claims involving Prohibited Conduct; **[DRAFTING NOTE: Neola encourages the Board to include an informal resolution process.]**
- B. sufficient information available at the time to allow the parties to respond to the allegations, including the identities of the parties involved in the incident(s), the conduct alleged to constitute Prohibited Conduct, and the date(s) and location(s) of the alleged incident(s); and
- C. retaliation is prohibited.

Should the CO decide, at any point, to investigate allegations that are materially beyond the scope of the initial written notice, the CO will provide a supplemental written notice describing the additional allegations to be investigated.

#### **Dismissal of a Complaint:**

The CO may dismiss a complaint of Prohibited Conduct if:

- A. the District is unable to identify the respondent after taking reasonable steps to do so;
- B. the respondent is not participating in the District's education program or activity and is not employed by the Board;
- C. the complainant voluntarily withdraws any or all the allegations in the complaint, the CO declines to initiate a complaint, and the District determines that, without the complainant's withdrawn allegations, the conduct that remains alleged in the complaint, if any, would not constitute Prohibited Conduct even if proven; or
- D. the District determines the conduct alleged in the complaint, even if proven, would not constitute Prohibited Conduct. Before dismissing the complaint, the CO will make reasonable efforts to clarify the allegations with the complainant.

Upon dismissal, the CO will promptly notify, in writing, the complainant of the basis for the dismissal. If the dismissal occurs after the respondent has been notified of the allegations, the CO will also simultaneously notify, in writing, the respondent of the dismissal and the basis for the dismissal.

The CO will further notify the complainant that a dismissal may be appealed and will provide the complainant with an opportunity to appeal the dismissal of the complaint. If the dismissal occurs after the respondent has been notified of the allegations, then the CO will also notify the respondent that the dismissal may be appealed.

Dismissals may be appealed on the following bases:

- A. procedural irregularity that would change the outcome;
- B. new evidence that would change the outcome and that was not reasonably available when the dismissal was made; and
- C. the CO had a conflict of interest or bias for or against complainants or respondents generally, or the individual complainant or respondent, that would change the outcome.

If the dismissal is appealed, the CO will:

- A. notify the parties of any appeal, including notice of the allegations, if notice was not previously provided to the respondent;
- B. implement appeal procedures equally for the parties;
- C. ensure that the appeal decisionmaker did not take part in the original dismissal of the complaint;
- D. ensure that the appeal decisionmaker has been trained consistent with this Policy (  ) and AG 3122 **[END OF OPTION]**;
- E. provide the parties a reasonable and equal opportunity to make a statement in support of, or challenging, the outcome; and

F. notify the parties of the result of the appeal and the rationale for the result.

When a complaint is dismissed, the CO will, at a minimum:

- A. offer supportive measures to the complainant as appropriate;
- B. if the respondent has been notified of the allegations, offer supportive measures to the respondent as appropriate; and
- C. take other prompt and effective steps, as appropriate, to ensure that Prohibited Conduct does not continue or recur within the District's education programs or activities.

**[DRAFTING NOTE: Neola encourages the Board to select the following option so the CO can choose, in appropriate circumstances, to offer the parties the opportunity to participate in an informal resolution process, or to honor the parties' request to use an informal resolution process, to end the Prohibited Conduct, prevent its recurrence, and remedy its effects.]**

**[OPTIONAL LANGUAGE: INFORMAL RESOLUTION PROCESS]**

**Informal Resolution Process:**

In lieu of resolving a complaint through the Board's formal grievance procedures, the parties may instead elect to participate in an informal resolution process. The District will not offer informal resolution to resolve a complaint when such a process would conflict with Federal, State, or local law.

**[END OF OPTIONAL LANGUAGE: INFORMAL RESOLUTION PROCESS]**

**Adding Allegations and/or Consolidating Complaints:**

If, in the course of an investigation, the District decides to investigate additional allegations of Prohibited Conduct by the respondent toward the complainant that are not included in the original Notice of Allegations or to consolidate charges raised in a different complaint involving the same respondent, the CO will notify the parties of the additional allegations.

**Investigation:**

The District will provide for an adequate, reliable, and impartial investigation of complaints.

The burden is on the District — not on the parties — to conduct an investigation that gathers sufficient evidence to determine whether Prohibited Conduct occurred.

The CO, or the designated investigator/decisionmaker, will provide an equal opportunity for the parties to present fact witnesses and other inculpatory and exculpatory evidence that are relevant and not otherwise impermissible.

The CO, or the designated investigator/decisionmaker, will review all evidence gathered through the investigation and determine what evidence is relevant and what evidence is impermissible, regardless of relevance.

**Determination of Whether Prohibited Conduct Occurred:**

Following an investigation and evaluation of all relevant and not otherwise impermissible evidence, the CO or designated investigator/decisionmaker will:

- A. Use the preponderance of the evidence standard of proof to determine whether Prohibited Conduct occurred. This standard of proof requires the decisionmaker to evaluate relevant and not otherwise impermissible evidence for its persuasiveness. If the decisionmaker, applying the applicable standard, is not persuaded by the relevant and not otherwise impermissible evidence that Prohibited Conduct occurred, regardless of the quantity of the evidence, the decisionmaker will not determine that Prohibited Conduct occurred. **[DRAFTING NOTE: While a board of education could elect to use the "clear and convincing" evidence standard of proof, Neola does not recommend it. If a board does select the "clear and convincing" standard, it should use it in all other comparable proceedings. Neola expects it will be a rare situation when a board chooses to use a clear and convincing standard of proof.]**
- B. Notify the parties, in writing, of the determination whether Prohibited Conduct occurred, including the rationale for such determination (), and the procedures and permissible bases for the complainant and respondent to appeal **[END OF OPTION]**.
- C. Not impose discipline on a respondent for Prohibited Conduct unless there is a determination at the conclusion of the grievance procedures that the respondent engaged in Prohibited Conduct.
- D. If there is a determination that Prohibited Conduct occurred, the CO will, as appropriate:

- 1. coordinate the provision and implementation of remedies to a complainant and other people the District identifies as having had equal access to the District's education programs or activities limited or denied by the Prohibited Conduct;

2. coordinate the imposition of any disciplinary sanctions on a respondent (  ), including notification to the complainant of any such disciplinary sanctions **[END OF OPTION]**; and
3. take other appropriate prompt and effective steps to ensure that the Prohibited Conduct does not continue or recur within the District's education programs or activities.

E. Comply with the grievance procedures before the imposition of any disciplinary sanctions against a respondent.

F. Not discipline a party, witness, or others participating in the grievance procedures for making a false statement based solely on the determination of whether Prohibited Conduct occurred.

**[DRAFTING NOTE: If the CO dismisses a complaint in the Evaluation stage (i.e., prior to commencing an investigation), the complainant may appeal as set forth above. Neola also recommends the Board include an appeal process related to the Determination.]**

**[OPTIONAL LANGUAGE - APPEAL OF DETERMINATION]**

**Appeal of Determinations:**

If a party disagrees with the decisionmaker's determination as to whether Prohibited Conduct occurred, the party may file an appeal. Appeals must be submitted, in writing, within five (5) **business (INSERT AMOUNT)** days of the appealing party's receipt of the Determination.

A party may appeal a Determination on the following bases:

- A. procedural irregularity that would change the outcome;
- B. new evidence that would change the outcome and that was not reasonably available when the investigation occurred and the Determination was made; and
- C. the CO, or the designated investigator/decisionmaker, had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that would change the outcome;

**[DRAFTING NOTE: The Board may insert additional grounds on which an appeal may be filed.]**

- D. ~~( ) the recommended remedies (including disciplinary sanctions/consequences) are unreasonable in light of the findings of fact (i.e., the nature and severity of the Prohibited Conduct).~~
- E. ~~( ) [OTHER] \_\_\_\_\_.~~

~~[ ] The complainant may not challenge the ultimate disciplinary sanction/consequence that is imposed. [END OF OPTION]~~

**[DRAFTING NOTE: The following options are offered in case the Board wants the Superintendent to serve as the appeal decisionmaker or the Board wants to nominally be identified as the appeal decisionmaker but will be delegating the responsibility to a person who is properly trained. Neola does not recommend that the Board itself be named as the appeal decisionmaker because of the preference for the decisionmaker to be trained to render a decision. If the Board wants to serve as the appeal decisionmaker, it should discuss this issue with its Legal Counsel. Select OPTION 1 or OPTION 2 below.]**

~~[ ] [OPTION 1]~~

~~The CO will designate an appeal decisionmaker, who will be a person who did not conduct the Investigation and render the Determination, and is appropriately trained ( ), as set forth in AG 3122 [END OF INTERNAL OPTION].~~

~~The CO has authority ( ), in consultation with ( ) and approval of [END OF OPTION] the Superintendent or ( ) Board ( ) Board President (as appropriate), [END OF OPTIONS] to secure an independent Third Party to serve as the appeal decisionmaker.~~

~~[ ] In designating an appeal decisionmaker, the CO will work with the Board to identify and appoint an independent Third Party to serve as the appeal decisionmaker— this individual shall be considered to be the Board's designee and will submit the appeal decision to the Board who will promptly adopt it as written and forward it to the CO who will send it simultaneously to the parties. [END OF OPTIONAL SENTENCE]~~

~~[END OF OPTION 1]~~

**[OPTION 2]**

The Superintendent shall serve as the appeal decisionmaker, provided the Superintendent has not been otherwise involved in the grievance procedures (i.e., did not serve as the investigator/decisionmaker or informal resolution process facilitator) and is appropriately trained. If the Superintendent is not eligible to serve as the appeal decisionmaker, the CO will designate an appeal

decisionmaker, who will be a person who did not conduct the Investigation and render the Determination, and is appropriately trained (  ), as set forth in AG 3122 [END OF INTERNAL OPTION].

[END OF OPTION 2]

[END OF OPTIONS]

If a party appeals the Determination, the CO will:

- A. notify the parties of the appeal;
- B. implement appeal procedures equally for the parties;
- C. provide the parties a reasonable and equal opportunity to make a statement in support of, or challenging, the Determination;
- D. provide the appeal decisionmaker with the relevant and not otherwise impermissible evidence and the Determination; and
- E. notify the parties, in writing, of the result of the appeal and the appeal decisionmaker's rationale for the outcome.

**Parties Provided a Reasonable and Equal Opportunity to Make a Statement in Support of, or Challenging, the Dismissal (  ) or Determination [END OF OPTION]**

When a party files an appeal, the party must set forth the reason(s)/basis/bases for the appeal, and the other party will have five ( 5 ) business [INSERT AMOUNT] days to provide the appeal decisionmaker with a statement in support of their position. Once the decisionmaker receives the statement (or the deadline for filing such a statement expires), the appeal decisionmaker will have five ( 5 ) business [INSERT AMOUNT] days to issue a decision on the appeal.

**[DRAFTING NOTE: Neola suggests any appeals should be filed within five (5) days of the parties receiving written notice of the Determination. Neola further suggests that the timeline for the other party submitting a statement be equivalent to the timeframe in which an appeal has to be filed. Finally, Neola suggests the appeal decisionmaker have ten (10) days from receipt of the statements to issue a decision.]**

While a party appealing a Determination may argue the reason/basis for the appeal is that new evidence has been discovered/obtained that would change the outcome and that said new evidence was not reasonably available when the Determination was originally made, the party may not submit the new or additional evidence during the appeal process. Rather, the party appealing should identify/describe in detail the evidence, including how and when it was discovered/obtained, and explain why it was not reasonably available during the Investigation (i.e., prior to the Determination). If the appeal decisionmaker accepts the proffered explanation, the appeal decisionmaker should remand the case back to the investigator/decisionmaker (i.e., reopen the investigation) so the new evidence may be submitted and considered by the other party and the investigator/decisionmaker.

The appeal decisionmaker shall determine the outcome of the appeal based on the appeal decisionmaker's independent review of the record (i.e., the relevant and not otherwise impermissible evidence and the written determination) and the appeal decisionmaker's application of the law and Board policy to the facts in the record. The appeal decisionmaker must give due deference and due weight to the decisionmaker's factual findings and credibility determinations and should not overturn them unless non-testimonial extrinsic evidence in the record justifies a contrary conclusion or unless the record read in its entirety compels a contrary conclusion. Generally, the appeal decisionmaker is expected to uphold the original Determination unless the appeal decisionmaker concludes the original Determination is unlawful, unreasonable, or against the manifest weight of the evidence. Every reasonable presumption must be made in favor of the original Determination.

The appeal decisionmaker shall

**[DRAFTING NOTE: The Board must select either OPTION 1 or OPTION 2 unless the Board appointed an independent Third Party to serve as the Board's appeal decisionmaker, in which case the Board should select OPTION 3.]**

[OPTION 1]

simultaneously notify the parties, in writing, of the result of the appeal and the rationale for the outcome.

[END OF OPTION 1]

[OR]

~~( ) [OPTION 2]~~

~~notify the CO, in writing, of the result of the appeal and the rationale for the outcome. The CO will then simultaneously notify the parties, in writing, of the result of the appeal and the appeal decisionmaker's rationale for the outcome.~~

~~[END OF OPTION 2]~~

~~[OR]~~

~~( )~~ [OPTION 3]

~~submit the appeal decision to the Board who will promptly adopt it as written and forward it to the CO, who will send it simultaneously to the parties. The appeal decision shall set forth the result of the appeal and the appeal decisionmaker's rationale for the outcome.~~

~~[END OF OPTION 3]~~

The  appeal decisionmaker's ~~( )~~ Board's [END OF OPTION] decision shall be final.

[END OF OPTIONAL LANGUAGE - APPEAL OF DETERMINATION]

**Supportive Measures:**

The District will offer and coordinate supportive measures as appropriate for the complainant and/or respondent to restore or preserve that person's access to the District's education programs or activities or provide support during the grievance procedures and/or during the informal resolution process. For allegations of Prohibited Conduct other than prohibited harassment or retaliation, the District's provision of support measures does not require the District, Board employees, or any other person authorized to provide aid, benefit, or service on the District's behalf to alter the alleged discriminatory/retaliatory conduct for the purpose of providing a supportive measure.

The CO shall determine appropriate supportive measures on a case-by-case basis. Supportive measures may vary depending on what the CO deems to be reasonably available. Supportive measures may include, but are not limited to: modifications of work schedules, mutual restrictions on contact between the parties; changes in work locations; leaves of absence; increased security and monitoring of certain work settings; training related to Prohibited Conduct;  referral to Employee Assistance Program; [END OF OPTION] and other similar measures.

Supportive measures must not unreasonably burden either party and must be designed to protect the safety of the parties and/or the District's educational environment, or to provide support during the Board's grievance procedures or the informal resolution process.

The District will not impose such measures for punitive or disciplinary reasons.

The CO may, as appropriate, modify or terminate supportive measures at the conclusion of the grievance procedures, or at the conclusion of the informal resolution process, or the District may continue them beyond that point.

A party may seek additional modification or termination of a supportive measure applicable to them if circumstances change materially.

The District will not disclose information about any supportive measures to persons other than the person to whom they apply, including informing one party of supportive measures provided to another party, unless necessary to provide the supportive measure or restore or preserve a party's access to the District's education programs or activities, or as otherwise permitted under existing law and/or policy.

The Superintendent may place an employee respondent on administrative leave from employment responsibilities during the pendency of the Board's grievance procedures.

**Disciplinary Sanctions and Remedies:**

Following a determination that Prohibited Conduct occurred, the District may impose disciplinary sanctions, which may include:

- A.  oral or written warning;
- B.  written reprimands;
- C.  required counseling;
- D.  required training or education;
- E.  demotion;
- F.  suspension with pay;

[END OF OPTIONS]

- G. suspension without pay;
- H. termination; and

I. any other sanction authorized by any applicable Board policy, Employee/Administrator Handbook, and/or collective bargaining agreement.

The District may also provide remedies, which may include disciplinary sanctions/consequences. The CO will notify the Superintendent of the recommended remedies, so an authorized administrator can consider the recommendation and implement appropriate remedies in compliance with applicable due process procedures, whether statutory or contractual.

**[DRAFTING NOTE: The Board should review applicable policy(ies)/administrative guidelines/employee handbooks to determine whether changes are needed to establish timelines associated with imposition of discipline as a result of possible delays caused by the Board implementing the preceding grievance procedures; likewise, the Board may need to discuss with union representatives how implementation of the grievance procedures may impact any disciplinary provisions contained in applicable collective bargaining (e.g., timelines, permitted attendees at investigative interviews, etc.).]**

Discipline of an employee will be implemented in accordance with Federal and State law, Board policy, and applicable provisions of any relevant collective bargaining agreement.

### **Retaliation**

Retaliation against a person who makes a report or files a complaint alleging Prohibited Conduct or retaliation, or participates in an investigation, is prohibited. Neither the Board nor any other person may intimidate, threaten, coerce, or discriminate against any individual for the purpose of interfering with any right or privilege secured by the U.S. Constitution, the Michigan Constitution, Federal or State law, or this policy, or because the individual made a report or complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing under this policy. Intimidation, threats, coercion, or discrimination, including initiating a disciplinary process against a person for a code of conduct violation that does not involve Prohibited Conduct but arises out of the same facts and circumstances as a complaint or information reported about possible Prohibited Conduct, for the purpose of interfering with the exercise of any right or privilege secured by Federal or State law constitutes retaliation. Retaliation against a person for making a complaint or participating in an investigation is a serious violation of this policy that can result in the imposition of disciplinary sanctions/consequences and/or other appropriate remedies.

Complaints alleging retaliation may be filed according to the grievance procedures set forth above. The District shall initiate its grievance procedures upon receiving any complaint alleging retaliation.

The exercise of rights protected under the First Amendment of the United States Constitution does not constitute retaliation prohibited under this policy.

Charging an individual with a code of conduct violation for making a materially false statement in bad faith in the course of a grievance proceeding under this policy shall not constitute retaliation, provided, however, that a determination that Prohibited Conduct occurred, alone, is not sufficient to conclude that any party made a materially false statement in bad faith.

### **Privacy/Confidentiality**

The District will employ all reasonable efforts to protect the rights of the complainant, the respondent(s), and the witnesses as much as possible, consistent with the Board's legal obligations to investigate, to take appropriate action, and to conform with any discovery or disclosure obligations. The District will keep confidential the identity of any individual who has made a complaint of Prohibited Conduct, any complainant, any individual who has been reported to be the perpetrator of Prohibited Conduct, any respondent, and any witness, except as may be permitted by the Family Educational Rights and Privacy Act ("FERPA"), 20 U.S.C. 1232g, or FERPA regulations, 34 C.F.R. part 99, or as required by law, or to carry out the purposes of relevant Federal or State law or regulations, including the conduct of any investigation, hearing, or judicial proceeding arising thereunder (i.e., the District's obligation to maintain confidentiality shall not impair or otherwise affect the complainant's and respondent's receipt of the information to which they are entitled related to the investigation and determination of whether Prohibited Conduct occurred). All records generated under the terms of this policy shall be maintained as confidential to the extent permitted by law. Confidentiality, however, cannot be guaranteed. Additionally, the respondent must be provided the complainant's identity.

During an investigation, the CO or designated investigator/decisionmaker will instruct each person who is interviewed about the importance of maintaining confidentiality. Any individual who is interviewed as part of an investigation is expected not to disclose to other members of the School District Community or Third Parties any information that is learned or provided during the course of the investigation.

### **Sanctions and Monitoring**

The Board shall vigorously enforce its prohibitions against Prohibited Conduct by taking appropriate action reasonably calculated to stop and prevent further misconduct. While observing the principles of due process, a violation of this policy may result in disciplinary action up to and including the discharge of an employee. All disciplinary action will be taken in accordance with applicable State law and the terms of the relevant collective bargaining agreement(s). When imposing discipline, the Superintendent shall consider the totality of the circumstances involved in the matter. In those cases where Prohibited Conduct is not substantiated, the Board may consider whether the alleged conduct nevertheless warrants discipline in accordance with other Board policies, consistent with the terms of the relevant collective bargaining agreement(s).

When the Board becomes aware that a prior remedial action has been taken against a member of the School District community, all subsequent sanctions imposed by the Board and/or Superintendent shall be reasonably calculated to end such conduct, prevent its reoccurrence, and remedy its effects.

### **Application of the First Amendment**

The Board will construe and apply this policy consistent with the First Amendment to the U.S. Constitution () and the principles of academic freedom as set forth in the applicable collective bargaining agreement **[END OF OPTION]**. In no case will a respondent be found to have committed Prohibited Conduct based on expressive conduct that is protected by the First Amendment () and/or the principles of academic freedom specified in the Board's collective bargaining agreement with its teachers **[END OF OPTION]**.

### **Training**

All employees, investigators, decisionmakers, facilitators of informal resolution process, the District Compliance Officer(s), and other persons who are responsible for implementing the Board's grievance procedures or have the authority to modify or terminate supportive measures shall receive training related to their duties under applicable Federal and State laws and this policy.  The training shall be provided promptly upon hiring or a change of position that alters their duties under this policy, and annually thereafter. **[END OF OPTIONAL SENTENCE]** The training shall not rely on stereotypes involving Protected Classes.

~~Training materials will be made available for inspection upon request by members of the public. **[END OF OPTION]**~~

### **Recordkeeping (including retention of investigatory records and materials)**

The District Compliance Officer(s) is/are responsible for overseeing retention of all records that must be maintained pursuant to this policy. All individuals charged with conducting investigations under this policy must retain all information, documents, electronically stored information, and electronic media (as defined in Policy 8315) created and received as part of an investigation. Records and materials associated with the implementation of this policy shall be retained in accordance with Policy 8310, Policy 8315, Policy 8320, and Policy 8330 for the period set forth below, unless required to be maintained for a longer period pursuant to the District's records retention schedule.

**[DRAFTING NOTE: For purposes of uniformity, Neola recommends that the Board use the same seven (7) year period for recordkeeping that is required by the 2020 Title IX regulations - see Board Policy 2266; if the Board selects a different timeframe for maintaining the below specified records, it should verify the time period selected is consistent with and/or reflected in its record retention schedule – see AG 8310.]**

The District shall maintain for a period of seven (7) calendar years the following records:

- A. for each complaint of Prohibited Conduct, records documenting the informal resolution process and/or the grievance procedures followed and the resulting outcome;
- B. for each notification that the District Compliance Officer receives of information about conduct that reasonably may constitute Prohibited Conduct, records documenting the actions the District took to implement this policy; and
- C. all materials used to provide the training referenced above () and in AG 3122 **[END OF OPTION]**.

The information, documents, ESI, and electronic media (as defined in Policy 8315) retained may include public records and records exempt from disclosure under Federal and/or State law (e.g., student records, medical records).

### **Outside Appointments, Dual Appointments, and Delegations**

The Board retains discretion to appoint suitably qualified persons who are not Board employees to fulfill any function of the Board under this policy including, but not limited to, District Compliance Officer, investigator, decisionmaker, appeal decisionmaker, or facilitator of the informal resolution process.

The Board also retains discretion to appoint two (2) or more persons to jointly fulfill the role of District Compliance Officer, investigator, decisionmaker, appeal decisionmaker, and facilitator of the informal resolution process.

The Superintendent may delegate functions assigned to a specific Board employee under this policy including, but not limited to, the functions assigned to the District Compliance Officer, investigator, decisionmaker, appeal decisionmaker, and facilitator of the informal resolution process to any suitably qualified individual, and such delegation may be rescinded by the Superintendent at any time.

**[DRAFTING NOTE: The following option expressly sets forth authority that the Board has, regardless of whether it is included in this policy, but is offered for those boards of education that may want to affirmatively communicate to/address these issues for readers of this policy.]**

### **Discretion in Application**

~~The Board retains discretion to interpret and apply this policy in a manner that is not clearly unreasonable, even if the Board's interpretation or application differs from the interpretation of any specific complainant and/or respondent.~~

Despite the Board's reasonable efforts to anticipate all eventualities in drafting this policy, it is possible that unanticipated or extraordinary circumstances may not be specifically or reasonably addressed by the express policy language, in which case the Board retains discretion to respond to the unanticipated or extraordinary circumstance in a way that is not clearly unreasonable.

The provisions of this policy are not contractual in nature, whether in their own right or as part of any other express or implied contract. Accordingly, the Board retains discretion to revise this policy at any time and for any reason. The Board may apply policy revisions to an active case provided that doing so is not clearly unreasonable.

**[END OF OPTION]**

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Legal

- M.C.L. 37.2101 et seq., 37.1101 et seq.
- 20 U.S.C. 1092(F)(6)(A)(v)
- 20 U.S.C. 1232g
- 20 U.S.C. Section 1681, Title IX of Education Amendment Act
- 20 U.S.C. Section 1701 et seq., Equal Educational Opportunities Act of 1974
- 20 U.S.C. Section 7905, Boy Scouts of America Equal Access Act
- 29 C.F.R. Part 1635
- 29 U.S.C. 201 et seq., The Fair Labor Standards Act ("FLSA")
- 29 U.S.C. 218d, PUMP for Nursing Mothers Act ("PUMP Act")
- 29 U.S.C. 621 et seq., Age Discrimination in Employment Act of 1967
- 29 U.S.C. 701 et seq. (in particular 794), Rehabilitation Act of 1973, as amended
- 34 C.F.R. Part 110 (7/27/93)
- 38 U.S.C. Chapter 43 4301-4335 (see in particular 4311(a) [prohibits discrimination based on military service] and 4312 [reemployment rights]), Uniformed Services Employment and Reemployment Rights Act ("USERRA")
- 42 U.S.C. 1983
- 42 U.S.C. 2000d et seq.
- 42 U.S.C. 2000e et seq., Civil Rights Act of 1964 (e.g., Title VI and Title VII), as amended by the Pregnancy Discrimination Act
- 42 U.S.C. 2000ff et seq., The Genetic Information Nondiscrimination Act
- 42 U.S.C. 2000gg, Pregnant Workers Fairness Act ("PWFA")
- 42 U.S.C. 6101 et seq., Age Discrimination Act of 1975
- 42 U.S.C. 12101 et seq., The Americans with Disabilities Act of 1990, as amended
- Fourteenth Amendment, U.S. Constitution

**Last Modified by Jennifer Perkins on March 18, 2026**

Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Vol. 40, No. 1 - Nondiscrimination - September 2025 Rescind ANTI-HARASSMENT
Code	po3362
Status	
Adopted	September 13, 2012
Last Revised	March 27, 2023

### **Rescind Policy - Vol. 40, No. 1**

#### **~~3362 — ANTI-HARASSMENT~~**

#### **General Policy Statement**

~~It is the policy of the Board of Education to maintain an education and work environment that is free from all forms of unlawful harassment, including sexual harassment. This commitment applies to all School District operations, programs, and activities. All students, administrators, teachers, staff, and all other school personnel share responsibility for avoiding, discouraging, and reporting any form of unlawful harassment. This policy applies to unlawful conduct occurring on school property, or at another location if such conduct occurs during an activity sponsored by the Board.~~

~~The Board will vigorously enforce its prohibition against harassment based on race, color, national origin, sex (including sexual orientation and gender identity), disability, age (except as authorized by law), religion, height, weight, marital or family status, military status, ancestry, or genetic information (collectively, Protected Classes) that are protected by Federal civil rights laws (hereinafter referred to as unlawful harassment) and encourages those within the School District community, as well as Third Parties, who feel aggrieved to seek assistance to rectify such problems. The Board will investigate all allegations of harassment and in those cases where unlawful harassment is substantiated, the Board will take immediate steps to end the harassment, prevent its recurrence, and remedy its effects. Individuals who are found to have engaged in unlawful harassment will be subject to appropriate disciplinary action.~~

~~[ ] The District will offer counseling services to any person found to have been subjected to unlawful harassment, and where appropriate, the person(s) who committed the unlawful harassment.~~

#### **Other Violations of the Anti-Harassment Policy**

~~The Board will also take immediate steps to impose disciplinary action on individuals engaging in any of the following prohibited acts:~~

- ~~A. Retaliating against a person who has made a report or filed a complaint alleging unlawful harassment, or who has participated as a witness in a harassment investigation.~~
- ~~B. Filing a malicious or knowingly false report or complaint of unlawful harassment.~~
- ~~C. Disregarding, failing to investigate adequately, or delaying investigation of allegations of harassment, when responsibility for reporting and/or investigating unlawful harassment charges comprises part of one's supervisory duties.~~

#### **Definitions**

~~Words used in this policy shall have those meanings defined herein; words not defined herein shall be construed according to their plain and ordinary meanings.~~

~~**Complainant** is the individual who alleges, or is alleged, to have been subjected to unlawful harassment, regardless of whether the person files a formal complaint or is pursuing an informal resolution to the alleged harassment.~~

**Respondent** is the individual who has been alleged to have engaged in unlawful harassment, regardless of whether the Reporting Party files a formal complaint or is seeking an informal resolution to the alleged harassment.

**School District community** means students and Board employees (i.e., administrators and professional and support staff), as well as Board members, agents, volunteers, contractors, or other persons subject to the control and supervision of the Board.

**Third Parties** include, but are not limited to, guests and/or visitors on School District property (e.g., visiting speakers, participants on opposing athletic teams, parents), vendors doing business with, or seeking to do business with, the Board, and other individuals who come in contact with members of the School District community at school-related events/activities (whether on or off District property).

**Day(s):** Unless expressly stated otherwise, the term "day" or "days" as used in this policy means business day(s) (i.e., a day(s) that the Board office is open for normal operating hours, Monday—Friday, excluding State recognized holidays).

### **Bullying**

Bullying rises to the level of unlawful harassment when one or more persons systematically and chronically inflict physical hurt or psychological distress on one (1) or more students or employees and that bullying is based upon one (1) or more Protected Classes, that is, characteristics that are protected by Federal civil rights laws. It is defined as any unwanted and repeated written, verbal, or physical behavior including any threatening, insulting, or dehumanizing gesture by an adult or student that is severe or pervasive enough to create an intimidating, hostile, or offensive educational or work environment; cause discomfort or humiliation; or unreasonably interfere with the individual's school or work performance or participation; and may involve:

- A. teasing;
- B. threats;
- C. intimidation;
- D. stalking;
- E. cyberstalking;
- F. cyberbullying;
- G. physical violence;
- H. theft;
- I. sexual, religious, or racial harassment;
- J. public humiliation; or
- K. destruction of property.

**Harassment** means any threatening, insulting, or dehumanizing gesture, use of technology, or written, verbal or physical conduct directed against a student or school employee that:

- A. places a student or school employee in reasonable fear of harm to his/her person or damage to his/her property;
- B. has the effect of substantially interfering with a student's educational performance, opportunities, or benefits, or an employee's work performance; or
- C. has the effect of substantially disrupting the orderly operation of a school.

### **Sexual Harassment**

For purposes of this policy and consistent with Title VII of the Civil Rights Act of 1964, sexual harassment is defined as: Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when:

- A. Submission to such conduct is made either implicitly or explicitly a term or condition of an individual's employment, or status in a class, educational program, or activity.
- B. Submission or rejection of such conduct by an individual is used as the basis for employment or educational decisions affecting such individual.
- C. Such conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity.

Sexual harassment may involve the behavior of a person of any gender against a person of the same or another gender.

Sexual Harassment covered by Policy 2266—Nondiscrimination on the Basis of Sex in Education Programs or Activities is not included in this policy. Allegations of such conduct shall be addressed solely by Policy 2266.

Prohibited acts that constitute sexual harassment under this policy may take a variety of forms. Examples of the kinds of conduct that may constitute sexual harassment include, but are not limited to:

- A. Unwelcome sexual propositions, invitations, solicitations, and flirtations.
- B. Unwanted physical and/or sexual contact.
- C. Threats or insinuations that a person's employment, wages, academic grade, promotion, classroom work or assignments, academic status, participation in athletics or extra-curricular programs, activities, or events, or other conditions of employment or education may be adversely affected by not submitting to sexual advances.
- D. Unwelcome verbal expressions, including graphic sexual commentaries about a person's body, dress, appearance, or sexual activities; the unwelcome use of sexually degrading language, profanity, jokes, or innuendoes; unwelcome suggestive or insulting sounds or whistles; obscene telephone calls.
- E. Sexually suggestive objects, pictures, graffiti, videos, posters, audio recordings, or literature placed in the work or educational environment that may reasonably embarrass or offend individuals.
- F. Unwelcome and inappropriate touching, patting, or pinching; obscene gestures.
- G. Asking about, or telling about, sexual fantasies, sexual preferences, or sexual activities.
- H. Speculations about a person's sexual activities or sexual history, or remarks about one's own sexual activities or sexual history.
- I. Giving unwelcome personal gifts such as lingerie that suggest the desire for a romantic relationship.
- J. Leering or staring at someone in a sexual way, such as staring at a person's breasts, buttocks, or groin.
- K. A pattern of conduct, which can be subtle in nature, that has sexual overtones and is intended to create or has the effect of creating discomfort and/or humiliation to another.
- L. In the context of employees, consensual sexual relationships where such relationship leads to favoritism of a subordinate employee with whom the superior is sexually involved and where such favoritism adversely affects other employees or otherwise creates a hostile work environment.
- M. Inappropriate boundary invasions by a District employee or other adult member of the School District community into a student's personal space and personal life.
- N. Verbal, nonverbal, or physical aggression, intimidation, or hostility based on sex or sex stereotyping that does not involve conduct of a sexual nature.

Not all behavior with sexual connotations constitutes unlawful sexual harassment. Sex-based or gender-based conduct must be sufficiently severe, pervasive, and persistent such that it adversely affects, limits, or denies an individual's employment or education, or such that it creates a hostile or abusive employment or educational environment.

**[DRAFTING NOTE: Sexual conduct/relationships with students by District employees or any other adult member of the School District community is prohibited, and any teacher, administrator, coach, or other school authority who engages in sexual conduct with a student may also be guilty of the criminal charge of sexual battery. The issue of consent is irrelevant in regard to such criminal charge and/or with respect to the application of this policy to District employees or other adult members of the School District community.]**

### **Race/Color Harassment**

Prohibited racial harassment occurs when unwelcome physical, verbal, or nonverbal conduct is based upon an individual's race or color and when the conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working, and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity. Such harassment may occur where conduct is directed at the characteristics of a person's race or color, such as racial slurs, nicknames implying stereotypes, epithets, and/or negative references relative to racial customs.

### **Religious (Creed) Harassment**

Prohibited religious harassment occurs when unwelcome physical, verbal, or nonverbal conduct is based upon an individual's religion or creed and when the conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity. Such harassment may occur where conduct is directed at the characteristics of a person's religious tradition, clothing, or surnames, and/or involves religious slurs.

### National Origin/Ancestry Harassment

Prohibited national origin/ancestry harassment occurs when unwelcome physical, verbal, or nonverbal conduct is based upon an individual's national origin or ancestry and when the conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity. Such harassment may occur where conduct is directed at the characteristics of a person's national origin or ancestry, such as negative comments regarding customs, manner of speaking, language, surnames, or ethnic slurs.

### Disability Harassment

Prohibited disability harassment occurs when unwelcome physical, verbal, or nonverbal conduct is based upon an individual's disability and when the conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity. Such harassment may occur where conduct is directed at the characteristics of a person's disability, such as negative comments about speech patterns, movement, physical impairments or defects/appearances, or the like. Such harassment may further occur where conduct is directed at or pertains to a person's genetic information.

### Anti-Harassment Compliance Officers

The following individual(s) shall serve as the District's Anti-Harassment Compliance Officer(s) (hereinafter, "the Compliance Officer(s)"):

**[DRAFTING NOTE: Neola suggests the Board appoint both a male and a female Compliance Officer in order to provide Complainants with the option to report their concerns to an individual of the gender with which they feel most comfortable. The same individual(s) assigned to serve as Compliance Officer(s) may also be assigned to serve as the District's Section 504 Compliance Officer(s)/ADA Coordinator(s) and/or Title IX Coordinator(s). Additionally, by appointing two (2) Compliance Officers, there should also be a Compliance Officer available to investigate a claim of harassment that pertains to the other Compliance Officer.]**

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(School District Title)

\_\_\_\_\_  
(Telephone Number)

\_\_\_\_\_  
(Office Address)

\_\_\_\_\_  
(E-mail Address)

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(School District Title)

\_\_\_\_\_  
(Telephone Number)

\_\_\_\_\_  
(Office Address)

\_\_\_\_\_  
(E-mail Address)

The names, titles, and contact information of these individuals will be published annually on the School District's website ( ) and:

- A.  in the parent and staff handbooks.
- B.  in the School District Annual Report to the public.
- C.  on each individual school's website.
- D.  in the School District's calendar.
- E.  \_\_\_\_\_

The Compliance Officer(s)  is  are **[END OF OPTION]** responsible for coordinating the District's efforts to comply with applicable Federal and State laws and regulations, including the District's duty to address in a prompt and equitable manner any inquiries or complaints regarding harassment.

The Compliance Officer(s) will be available during regular school/work hours to discuss concerns related to unlawful harassment, to assist students, other members of the District community, and third parties who seek support or advice when informing another individual about unwelcome conduct, or to intercede informally on behalf of the individual in those instances where concerns have not resulted in the filing of a formal complaint and where all parties are in agreement to participate in an informal process.

The Compliance Officers shall accept reports of unlawful harassment directly from any member of the School District community or a Third Party or receive reports that are initially filed with an administrator, supervisor, or other District level official. Upon receipt of a report of alleged harassment, the Compliance Officer(s) will contact the Complainant and begin either an informal or formal complaint process (depending on the request of the Complainant or the nature of the alleged harassment) or the Compliance Officer(s) will designate a specific individual to conduct such a process. The Compliance Officer(s) will provide a copy of this policy to the Complainant and Respondent. In the case of a formal complaint, the Compliance Officer(s) will prepare recommendations for the Superintendent or will oversee the preparation of such recommendations by a designee. All Board employees must report incidents of harassment that are reported to them to a Compliance Officer within two (2) days of learning of the incident.

Any Board employee who directly observes unlawful harassment is obligated, in accordance with this policy, to report such observations to a Compliance Officer within two (2) days. Additionally, any Board employee who observes an act of unlawful harassment is expected to intervene to stop the harassment unless circumstances make such an intervention dangerous, in which case the staff member should immediately notify other Board employees and/or local law enforcement officials, as necessary, to stop the harassment. Thereafter, a Compliance Officer or designee must contact the Complainant if age eighteen (18) or older, or the Complainant's parents/guardians if the Complainant is under the age of eighteen (18), within two (2) days to advise of the Board's intent to investigate the alleged wrongdoing.

### **Reports and Complaints of Harassing Conduct**

Members of the School District community along with Third Parties are encouraged to promptly report incidents of harassing conduct to an administrator, supervisor, or other School District official so that the Board may address the conduct before it becomes severe, pervasive, or persistent. Any administrator, supervisor, or other District official who receives such a report shall file it with a Compliance Officer within two (2) days of receiving the report of harassment.

Members of the School District community and Third Parties who believe they have been unlawfully harassed by another member of the School District community or a Third Party are entitled to utilize the Board's complaint process that is set forth below. Initiating a complaint, whether formally or informally, will not adversely affect the Complainant's employment or participation in educational or extra-curricular programs. While there are no time limits for initiating complaints of harassment under this policy, individuals should make every effort to file a complaint as soon as possible after the conduct occurs while the facts are known and potential witnesses are available.

If, during an investigation of alleged bullying, aggressive behavior, and/or harassment in accordance with Policy 5517.01—Bullying and Other Forms of Aggressive Behavior, the Principal believes that the reported misconduct may have created a hostile work environment and may have constituted unlawful discriminatory harassment based on a Protected Class, the Principal will report the act of bullying, aggressive behavior, and/or harassment to the Compliance Officer(s) who shall investigate the allegation in accordance with this policy. If the alleged harassment involves Sexual Harassment as defined by Policy 2266, the matter will be handled in accordance with the grievance process and procedures outlined in Policy 2266. While the Compliance Officer investigates the allegation, or the matter is being addressed pursuant to Policy 2266, the Principal shall suspend the Policy 5517.01 investigation to await the Compliance Officer's written report or the determination of responsibility pursuant to Policy 2266. The Compliance Officer shall keep the Principal informed of the status of the Policy 3362 investigation and provide the Principal with a copy of the resulting written report. Likewise, the Title IX Coordinator will provide the Principal with the determination of responsibility that results from the Policy 2266 grievance process.

### **Investigation and Complaint Procedure (See Form 3362-F1)**

Except for Sexual Harassment that is covered by Policy 2266—Nondiscrimination on the Basis of Sex in Education Programs or Activities, any employee or other member of the School District community or Third Party (e.g., visitor to the District) who believes that they have been subjected to unlawful harassment may seek resolution of the complaint through the procedures described below. The formal complaint process involves an investigation of the Complainant's claims of harassment or retaliation and a process for rendering a decision regarding whether the charges are substantiated.

Due to the sensitivity surrounding complaints of unlawful harassment, timelines are flexible for initiating the complaint process; however, individuals should make every effort to file a complaint within thirty (30) days after the conduct occurs while the facts are known and potential witnesses are available. Once the formal complaint process is begun, the investigation will be completed in a timely manner (ordinarily, within fifteen (15) business days of the complaint being received).

The procedures set forth below are not intended to interfere with the rights of any individual to pursue a complaint of unlawful harassment or retaliation with the United States Department of Education Office for Civil Rights and/or Equal Employment Opportunity Commission (EEOC).

### **Informal Complaint Procedure**

The goal of the informal complaint procedure is promptly to stop inappropriate behavior and to facilitate resolution through an informal means, if possible. The informal complaint procedure is provided as a less formal option for a student, other member of the School District community, or Third Party who alleges unlawful harassment or retaliation. This informal procedure is not required as a precursor to the filing of a formal complaint. The informal process is only available in those circumstances where the Complainant and the Respondent mutually agree to participate in it.

The Complainant may proceed immediately to the formal complaint process and individuals who seek resolution through the informal procedure may request that the informal process be terminated at any time to move to the formal complaint process.

All complaints involving a District employee, any other adult member of the School District community, or a Third Party and a student will be formally investigated.

As an initial course of action, if a Complainant feels comfortable and safe in doing so, the individual should tell or otherwise inform the Respondent that the allegedly harassing conduct is unwelcome and must stop. The Complainant should address the allegedly harassing conduct as soon after it occurs as possible. The Compliance Officers are available to support and counsel individuals when taking this initial step or to intervene on behalf of the Complainant if requested to do so. A Complainant who is uncomfortable or unwilling to directly approach the Respondent about the alleged inappropriate conduct may file an informal or a formal complaint. In addition, with regard to certain types of unlawful harassment, such as sexual harassment, the Compliance Officer may advise against the use of the informal complaint process.

A complainant may make an informal complaint, either orally or in writing: 1) to a teacher, other employee, or building administrator; 2) directly to one (1) of the Compliance Officers; and/or 3) to the Superintendent or other District level employee.

All informal complaints must be reported to one (1) of the Compliance Officers who will either facilitate an informal resolution as described below or appoint another individual to facilitate an informal resolution.

The Board's informal complaint procedure is designed to provide employees, other members of the School District community, or third parties who believe they are being unlawfully harassed with a range of options designed to bring about a resolution of their concerns. Depending upon the nature of the complaint and the wishes of the Complainant, informal resolution may involve, but not be limited to, one (1) or more of the following:

- A. Advising the Complainant about how to communicate the unwelcome nature of the behavior to the Respondent.
- B. Distributing a copy of this policy as a reminder to the individuals in the school building or office where the Respondent works or attends.
- C. If both parties agree, the Compliance Officer may arrange and facilitate a meeting or mediation between the Complainant and the Respondent to work out a mutual resolution.

While there are no set time limits within which an informal complaint must be resolved, the Compliance Officer/designee is directed to attempt to resolve all informal complaints within fifteen (15) business days of receiving the informal complaint. If the Complainant is dissatisfied with the informal complaint process, the Complainant may proceed to file a formal complaint. And, as stated above, either party may request that the informal process be terminated at any time to move to the formal complaint process.

### **Formal Complaint Procedure**

If a complaint is not resolved through the informal complaint process, if one of the parties has requested that the informal complaint process be terminated to move to the formal complaint process, or the Complainant, from the outset, elects to file a formal complaint, or the CO determines the allegations are not appropriate for resolution through the informal process, the formal complaint process shall be implemented.

The Complainant may file a formal complaint, either orally or in writing, with a teacher, Principal, Compliance Officer, Superintendent, or other District official. Due to the sensitivity surrounding complaints of unlawful harassment and retaliation, timelines are flexible for initiating the complaint process; however, individuals should make every effort to file a formal complaint within thirty (30) days after the conduct occurs while the facts are known and potential witnesses are available. If a Complainant informs a teacher, Principal, Superintendent, or other District official, either orally or in writing, about any complaint of harassment or retaliation, that employee must report such information to a Compliance Officer/designee within two (2) business days.

Throughout the course of the process, the Compliance Officer should keep the parties reasonably informed of the status of the investigation and the decision-making process.

All formal complaints must include the following information to the extent known: the identity of the Respondent; a detailed description of the facts upon which the complaint is based (i.e., when, where, and what occurred); a list of potential witnesses; and the resolution sought by the Complainant.

If the Complainant is unwilling or unable to provide a written statement including the information set forth above, the Compliance Officer shall ask for such details in an oral interview. Thereafter, the Compliance Officer will prepare a written summary of the oral interview, and the Complainant will be asked to verify the accuracy of the reported charge by signing the document.

Upon receiving a formal complaint, the Compliance Officer will consider whether any action should be taken in the investigatory phase to protect the Complainant from further harassment or retaliation including, but not limited to, a change of work assignment or schedule for the Complainant and/or the Respondent. In making such a determination, the Compliance Officer should consult the Complainant to assess whether the individual agrees with the proposed action. If the Complainant is unwilling to consent to the proposed change, the Compliance Officer may still take whatever actions deemed appropriate in consultation with the Superintendent.

Within two (2) business days of receiving the complaint, the Compliance Officer/designee will initiate a formal investigation to determine whether the Complainant has been subjected to offensive conduct/harassment/retaliation. The Principal will not conduct an investigation unless directed to do so by the Compliance Officer.

Simultaneously, the Compliance Officer will inform the Respondent that a formal complaint has been received. The Respondent will be informed about the nature of the allegations and provided with a copy of any relevant policies and/or administrative guidelines, including the Board's Anti-Harassment policy. The Respondent must also be informed of the opportunity to submit a written response to the formal complaint within five (5) days.

Although certain cases may require additional time, the Compliance Officer/designee will attempt to complete an investigation into the allegations of harassment/retaliation within fifteen (15) business days of receiving the formal complaint. The investigation will include:

- A. interviews with the Complainant;
- B. interviews with the Respondent;
- C. interviews with any other witnesses who may reasonably be expected to have any information relevant to the allegations;
- D. consideration of any documentation or other information presented by the Complainant, Respondent, or any other witness that is reasonably believed to be relevant to the allegations.

At the conclusion of the investigation, the Compliance Officer/designee shall prepare and deliver a written report to the Superintendent that summarizes the evidence gathered during the investigation and provides recommendations based on the evidence and the definition of unlawful harassment as provided in Board policy and State and Federal law as to whether the Respondent engaged in unlawful harassment/retaliation of the Complainant. The Compliance Officer's recommendations must be based upon the totality of the circumstances. In determining if discriminatory harassment or retaliation occurred, a preponderance of evidence standard will be used. The Compliance Officer may consult with the Board's legal counsel before finalizing the report to the Superintendent.

Absent extenuating circumstances, within five (5) business days of receiving the report of the Compliance Officer/designee, the Superintendent must either issue a final decision regarding whether the complaint of harassment has been substantiated or request further investigation. A copy of the Superintendent's written decision will be delivered to both the Complainant and the Respondent.

If the Superintendent requests additional investigation, the Superintendent must specify the additional information that is to be gathered and such additional investigation must be completed within five (5) business days. At the conclusion of the additional investigation, the Superintendent must issue a written decision as described above.

The decision of the Superintendent shall be final.

**OR**

A Complainant or Respondent who is dissatisfied with the final decision of the Superintendent may appeal through a signed written statement to the Board within five (5) business days of the party's receipt of the Superintendent's decision.

In an attempt to resolve the complaint, the Board shall meet with the concerned parties and their representative within twenty (20) business days of the receipt of such an appeal. A copy of the Board's disposition of the appeal shall be sent to each party within ten (10) business days of this meeting. The decision of the Board will be final.

**[END OF OPTIONS]**

The Board reserves the right to investigate and resolve a complaint or report of unlawful harassment/retaliation regardless of whether the member of the School District community or Third Party alleging the unlawful harassment/retaliation pursues the complaint. The Board also reserves the right to have the formal complaint investigation conducted by an external person in accordance with this policy or in such other manner as deemed appropriate by the Board or its designee.

~~[ ] The parties may be represented, at their own cost, at any of the above described meetings/hearings.~~

~~The right of a person to a prompt and equitable resolution of the complaint shall not be impaired by the person's pursuit of other remedies such as the filing of a complaint with the Office for Civil Rights, the filing of charges with local law enforcement, or the filing of a civil action in court. Use of this internal complaint process is not a prerequisite to the pursuit of other remedies.~~

### **Privacy/Confidentiality**

~~The District will employ all reasonable efforts to protect the rights of the Complainant, the Respondent, and the witnesses as much as possible, consistent with the Board's legal obligations to investigate, take appropriate action, and conform with any discovery or disclosure obligations. All records generated under the terms of this policy and related administrative guidelines shall be maintained as confidential to the extent permitted by law. Confidentiality, however, cannot be guaranteed. Additionally, the Respondent must be provided with the Complainant's identity.~~

~~During the course of a formal investigation, the Compliance Officer/designee will instruct all members of the School District community and Third Parties who are interviewed about the importance of maintaining confidentiality. Any individual who is interviewed as part of a harassment investigation is expected not to disclose any information that is learned or provided during the course of the investigation.~~

### **Sanctions and Monitoring**

~~The Board shall vigorously enforce its prohibitions against unlawful harassment/retaliation by taking appropriate action reasonably calculated to stop the harassment and prevent further such harassment. While observing the principles of due process, a violation of this policy may result in disciplinary action up to and including the discharge of an employee or the suspension/expulsion of a student. All disciplinary action will be taken in accordance with applicable State law and the terms of the relevant collective bargaining agreement(s). When imposing discipline, the Superintendent shall consider the totality of the circumstances involved in the matter, including the ages and maturity levels of those involved. In those cases where unlawful harassment is not substantiated, the Board may consider whether the alleged conduct nevertheless warrants discipline in accordance with other Board policies, consistent with the terms of the relevant collective bargaining agreement(s).~~

~~Where the Board becomes aware that a prior remedial action has been taken against a member of the School District community, all subsequent sanctions imposed by the Board and/or Superintendent shall be reasonably calculated to end such conduct, prevent its recurrence, and remedy its effects.~~

### **Retaliation**

~~Retaliation against a person who makes a report or files a complaint alleging unlawful harassment/retaliation or participates as a witness in an investigation is prohibited. Neither the Board nor any other person may intimidate, threaten, coerce or interfere with any individual because the person opposed any act or practice made unlawful by any Federal or State civil rights law, or because that individual made a report, formal complaint testified, assisted or participated or refused to participate in any manner in an investigation, proceeding, or hearing under those laws and/or the policy, or because that individual exercised, enjoyed, aided or encouraged any other person in the exercise or enjoyment of any right granted or protected by those laws and/or this policy.~~

~~Retaliation against a person for making a report of discrimination, filing a formal complaint, or participating in an investigation or meeting is a serious violation of this policy that can result in the imposition of disciplinary sanctions/consequences and/or other appropriate remedies.~~

~~Formal complaints alleging retaliation may be filed according to the internal complaint process set forth above.~~

~~The exercise of rights protected under the First Amendment of the United States Constitution does not constitute retaliation prohibited under this policy.~~

### **Allegations Constituting Criminal Conduct: Child Abuse/Sexual Misconduct**

~~State law requires any school teacher or school employee who knows or suspects that a child under the age of eighteen (18) or that a person with a disability receiving services as a student from the school regardless of age has suffered or faces a threat of suffering a physical or mental wound, disability, or condition of a nature that reasonably indicates abuse or neglect of a child to immediately report that knowledge or suspicion to the county children's services agency. If, during the course of a harassment investigation, the Compliance Officer or a designee has reason to believe or suspect that the alleged conduct reasonably indicates abuse or neglect of the Complainant, a report of such knowledge must be made in accordance with State law and Board Policy.~~

~~Any reports made to a county children's services agency or to local law enforcement shall not terminate the Compliance Officer's or a designee's obligation and responsibility to continue to investigate a complaint of harassment. While the Compliance Officer or a designee may work cooperatively with outside agencies to conduct concurrent investigations, in no event shall the harassment investigation be inhibited by the involvement of outside agencies without good cause after consultation with the Superintendent.~~

## Education and Training

In support of this Anti Harassment Policy, the Board promotes preventative educational measures to create greater awareness of unlawful discriminatory practices. The Superintendent shall provide appropriate information to all members of the School District community related to the implementation of this policy and shall provide training for District students and staff where appropriate. All training, as well as all information provided regarding the Board's policy and harassment in general, will be age and content appropriate.

## Retention of Investigatory Records and Materials

The Compliance Officer(s) is responsible for overseeing the retention of all records that must be maintained pursuant to this policy. All individuals charged with conducting investigations under this policy shall retain all documents, electronically stored information (ESI), and electronic media (as defined in Policy 8315) created and/or received as part of an investigation which may include, but not be limited to:

- A. all written reports/allegations/complaints/grievances/statements/responses pertaining to an alleged violation of this policy;
- B. any narratives that memorialize oral reports/allegations/complaints/grievances/statements/responses pertaining to an alleged violation of this policy;
- C. any documentation that memorializes the actions taken by District personnel or individuals contracted or appointed by the Board to fulfill its responsibilities related to the investigation and/or the District's response to the alleged violation of this policy;
- D. written witness statements;
- E. narratives, notes from, or audio, video, or digital recordings of witness interviews/statements;
- F. e-mails, texts, or social media posts that directly relate to or constitute evidence pertaining to an alleged violation of this policy (i.e., not after the fact commentary about or media coverage of the incident);
- G. notes or summaries prepared contemporaneously by the investigator in whatever form made (e.g., handwritten, keyed into a computer or tablet, etc.), but not including transitory notes whose content is otherwise memorialized in other documents;
- H. written disciplinary sanctions issued to students or employees and other documentation that memorializes oral disciplinary sanctions issued to students or employees for violations of this policy;
- I. dated written determinations/reports (including summaries of relevant exculpatory and inculpatory evidence) and other documentation that memorializes oral notifications to the parties concerning the outcome of the investigation, including any consequences imposed as a result of a violation of this policy;
- J. documentation of any supportive measures offered and/or provided to the Complainant and/or the Respondent, including no contact orders issued to both parties, the dates the no contact orders were issued, and the dates the parties acknowledged receipt of the no contact orders;
- K. documentation of all actions taken, both individual and systemic, to stop the discrimination or harassment, prevent its recurrence, eliminate any hostile environment, and remedy its discriminatory effects;
- L. copies of the Board policy and/or procedures/guidelines used by the District to conduct the investigation, and any documents used by the District at the time of the alleged violation to communicate the Board's expectations to students and staff with respect to the subject of this policy (e.g., Student Code of Conduct and/or Employee Handbooks);
- M. copies of any documentation that memorializes any formal or informal resolutions to the alleged discrimination or harassment;

**[DRAFTING NOTE: The following options should be selected if the district concludes that the following items are not adequately encompassed in the preceding paragraphs.]**

- N.  documentation of any training provided to District personnel related to this policy including, but not limited to, notification of the prohibitions and expectations of staff set forth in this policy and the role and responsibility of all District personnel involved in enforcing this policy, including their duty to report alleged violations of this policy and/or conducting an investigation of an alleged violation of this policy; **[REMINDER: Documentation of training should be maintained regardless of whether there is an investigation of an alleged violation of this policy. It is best practice to maintain a log of all staff members who participate in a training, along with the date, time and location of the training, and a copy of the materials reviewed and/or presented during the training.]**
- O.  documentation that any rights or opportunities that the District made available to one party during the investigation were made available to the other party on equal terms;

~~P. ( ) copies of any notices sent to the alleged perpetrator/responding party of the allegations constituting a potential violation of this policy;~~

~~Q. ( ) copies of any notices sent to the Complainant and the Respondent in advance of any interview, meeting, or hearing;~~

~~R. ( ) copies of any documentation or evidence used during informal and formal disciplinary meetings and hearings, including the investigation report, and any written responses submitted by the Complainant or the Respondent.~~

~~The documents, ESI, and electronic media (as defined in Policy 8315) retained may include public records and records exempt from disclosure under Federal (e.g., FERPA, ADA) and/or State law — e.g., student records and confidential medical records.~~

~~The documents, ESI, and electronic media (as defined in Policy 8315) created or received as part of an investigation shall be retained in accordance with Policy 8310, Policy 8315, Policy 8320, and Policy 8330 for not less than three (3) years, but longer if required by the District's records retention schedule.~~

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Legal

- 29 C.F.R. Part 1635
- 20 U.S.C. 1400 et seq., The Individuals with Disabilities Education Improvement Act of 2004 (IDEIA)
- 29 U.S.C. 621 et seq., Age Discrimination in Employment Act of 1967
- 29 U.S.C. 794, Rehabilitation Act of 1973, as amended
- 42 U.S.C. 1983
- 42 U.S.C. 2000e et seq.
- 42 U.S.C. 2000ff et seq., The Genetic Information Nondiscrimination Act
- 42 U.S.C. 6101, The Age Discrimination Act of 1975
- 42 U.S.C. 12101 et seq., Americans with Disabilities Act of 1990, as amended
- Title IX of the Educational Amendments of 1972, 20 U.S.C. 1681 et seq.
- The Handicappers Civil Rights Act, M.C.L. 37.1101 et seq.
- The Elliott-Larsen Civil Rights Act, M.C.L. 37.2101, et seq.
- Titles VI and VII of the Civil Rights Act of 1964, 42 U.S.C. 2000d et seq.
- Policies on Bullying, Michigan State Board of Education, 7-19-01
- Model Anti-Bullying Policy, Michigan State Board of Education, 09-2006
- National School Boards Association Inquiry and Analysis May 2008

**Last Modified by Wayne Wright on October 20, 2025**

Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Copy of SECTION 504/ADA PROHIBITION AGAINST DISABILITY DISCRIMINATION IN EMPLOYMENT
Code	po3123
Status	
Adopted	September 13, 2012
Last Revised	March 27, 2023

### 3123 - SECTION 504/ADA PROHIBITION AGAINST DISABILITY DISCRIMINATION IN EMPLOYMENT

The Board of Education prohibits discrimination against any employee or applicant based upon the employee's or applicant's/his/her disability. As such, the Board will not engage in employment practices or adopt policies that discriminate on the basis of disability, or otherwise discriminate against qualified individuals with disabilities in regard to job application procedures, the hiring, advancement or discharge of employees, employee compensation, job training, or other terms, conditions and privileges of employment. The Board further will not limit, segregate or classify applicants or employees in any way that adversely affects their opportunities or status because of disability. Additionally, the Board will not participate in any contractual or other relationships that have the effect of subjecting qualified individuals with disabilities who are applicants or employees to discrimination on the basis of disability.

"An individual with a disability" means a person who has, had a record of, or is regarded as having, a physical or mental impairment that substantially limits one (1) or more major life activities. Major life activities are functions such as caring for one's self, performing manual tasks, walking, seeing, hearing, eating, sleeping, standing, lifting, bending, speaking, breathing, learning, reading, concentrating, thinking, communicating, sitting, reaching, interacting with others, and working.

Major life activities also include the operation of a major bodily function, including, but not limited to, functions of the immune system, special sense organs and skin, normal cell growth, and digestive, genitourinary, bowel, bladder, neurological, brain, respiratory, circulatory, endocrine, hemic, lymphatic, musculoskeletal and reproductive functions. The operation of a major bodily function includes the operation of an individual organ within a body system.

An impairment that is episodic in nature or in remission is considered a disability if it would substantially limit a major life activity when active.

The determination of whether an impairment substantially limits a major life activity must be made without regard to the ameliorative effects of mitigating measures such as medication, medical supplies, equipment or appliances, low-vision devices (defined as devices that magnify, enhance, or otherwise augment a visual image, but not including ordinary eyeglasses or contact lenses), prosthetics (including limbs and devices), hearing aid(s) and cochlear implant(s) or other implantable hearing devices, mobility devices, oxygen therapy equipment or supplies, use of assistive technology, reasonable accommodations or "auxiliary aids or services," learned behavioral or adaptive neurological modifications, psychotherapy, behavioral therapy, or physical therapy.

A qualified person with a disability means the individual satisfies the requisite skill, experience, education and other job-related requirements of the employment position such individual holds or desires and, with or without reasonable accommodation, can perform the essential functions of the job in question.

The Board will provide a reasonable accommodation to a qualified individual who has an actual disability or who has a record of a disability, unless the accommodation would impose an undue hardship on the operation of the District's program and/or activities. A reasonable accommodation is not required for an individual who is merely regarded as having a disability.

#### **Compliance Officer(s)**

The Board designates the following individual(s) to serve as the District's 504 Compliance Officer(s)/ADA Coordinator(s) (hereinafter referred to as the "District Compliance Officer(s)").

Patrick Wolynski

Executive Director Staff & Student Services  
248-435-8400 x1211  
800 Devillen, Royal Oak, MI 48073  
patrick.wolynski@royaloakschools.org

Katherine Abela  
Executive Director Finance and Facilities  
248-435-8400 x1232  
800 Devillen, Royal Oak, MI 48073  
katherine.abela@royaloakschools.org

The names, titles, and contact information of these individuals will be published annually on the School District's web site.

The District Compliance Officer(s) are responsible for coordinating the District's efforts to comply with and fulfill its responsibilities under Section 504 and Title II of the Americans with Disabilities Act, as amended ("ADA"). A copy of Section 504 and the ADA, including copies of their implementing regulations, may be obtained from the District Compliance Officer(s).

The District Compliance Officer(s) will oversee the investigation of any complaints of discrimination based on disability, which may be filed pursuant to the Board's adopted internal complaint procedure, and will attempt to resolve such complaints. The Board will provide for the prompt and equitable resolution of complaints alleging violations of Section 504/ADA. See below.

### **Training**

The District Compliance Officer(s) will also oversee the training of employees in the District so that all employees understand their rights and responsibilities under Section 504 and the ADA, and are informed of the Board's policies, administrative guidelines and practices with respect to fully implementing and complying with the requirements of Section 504/ADA.

The Board will provide in-service training and consultation to staff responsible for the education of persons with disabilities, as necessary and appropriate.

### **Facilities**

No qualified person with a disability will, because the District's facilities are inaccessible to or unusable by persons with disabilities, be denied the benefits of, be excluded from participation in, or otherwise be subjected to discrimination under any program or activity to which Section 504/ADA applies.

For facilities constructed or altered after June 3, 1977, the District will comply with applicable accessibility standards. For those existing facilities constructed prior to June 3, 1977, the District is committed to operating its programs and activities so that they are readily accessible to persons with disabilities.

### **Notice**

Notice of the Board's policy on nondiscrimination in employment practices and the identity of the District's Compliance Officer(s) will be published on the District's website and posted throughout the District, and included the District's recruitment statements or general information publications.

### **Complaint Procedures**

If a person believes that **they have s/he** has been discriminated against on the basis of **his/her** disability, the person may utilize the following complaint procedures as a means of reaching, at the lowest possible administrative level, a prompt and equitable resolution of the matter.

In accordance with Section 504 of the Rehabilitation Act of 1973 and its implementing regulations ("Section 504"), employees will be notified of their right to file an internal complaint regarding an alleged violation, misinterpretation or misapplication of Section 504. In addition, employees will be notified of their right to file a complaint with the U.S. Department of Education's Office for Civil Rights.

Internal complaints must be put in writing and must identify the specific circumstances or areas of dispute that have given rise to the complaint, and offer possible solutions to the dispute. The complaint must be filed with a District Compliance Officer within the time limits specified below. The District's Compliance Officer is available to assist individuals in filing a complaint.

Unless expressly stated otherwise, the term "day" or "days" as used in this policy means business day(s) (i.e., a day(s) that the Board office is open for normal operating hours, Monday - Friday, excluding State-recognized holidays).

### **Internal Complaint Procedure**

The following internal complaint procedure is available to employees for the prompt and equitable resolution of complaints alleging discrimination based upon disability. This complaint procedure is not available to unsuccessful applicants. Use of the internal complaint procedure is not a prerequisite to the pursuit of other remedies, including the filing of a complaint with the U.S. Department of Education's Office for Civil Rights.

- A. An employee with a complaint based on alleged discrimination on the basis of disability may first discuss the problem with the District Compliance Officer.
- B. If the informal discussion does not resolve the matter, or if the employee skips Step A, the individual may file a formal written complaint with the District Compliance Officer. The written complaint must contain the name and address of the individual or representative filing the complaint, be signed by the complainant or someone authorized to sign for the complainant, describe the alleged discriminatory action in sufficient detail to inform the District Compliance Officer of the nature and date of the alleged violation, and propose a resolution. The complaint must be filed within thirty (30) days of the circumstances or event giving rise to the complaint, unless the time for filing is extended by the District Compliance Officer for good cause.
- C. The District Compliance Officer will conduct an independent investigation of the matter (which may or may not include a hearing). This complaint procedure contemplates informal, but thorough investigations, affording all interested persons and their representatives, if any, an opportunity to present witnesses and other evidence relevant to the complaint. The District Compliance Officer will provide the complainant with a written disposition of the complaint within ten (10) days. If no decision is rendered within ten (10) days, or the decision is unsatisfactory in the opinion of the complainant, the employee may file, in writing, an appeal with the Superintendent. The District Compliance Officer shall maintain the District's files and records relating to the complaint.
- D. The Superintendent will, within ten (10) days of receiving the written appeal, conduct a hearing with all parties involved in an attempt to resolve the complaint.  
  
The Superintendent will render a his/her decision with ten (10) days of the hearing.
- E. The employee may be represented, at the employee's his/her own cost, at any of the above-described meetings/hearings.
- F. The right of a person to a prompt and equitable resolution of the complaint shall not be impaired by the person's pursuit of other remedies such as the filing of a complaint with the Office for Civil Rights or the filing of a court case. Use of this internal complaint procedure is not a prerequisite to the pursuit of other remedies.

If it is determined that the Complainant was subjected to unlawful discrimination, the CO must identify what corrective action will be taken to stop, remedy, and prevent the recurrence of the discrimination/retaliation. The corrective action should be reasonable, timely, age-appropriate and effective, and tailored to the specific situation.

### OCR Complaint

At any time, if an employee believes that they have s/he has been subjected to discrimination based upon his/her disability in violation of Section 504 or the ADA, the individual may file a complaint with the U.S. Department of Education's Office for Civil Rights ("OCR"). The OCR can be reached at:

#### U.S. Department of Education

Office for Civil Rights  
 Lyndon Baines Johnson Department of Education Building  
 400 Maryland Ave., SW  
 Washington, DC 20202-1100  
 Telephone: (800) 421-3481  
 FAX: (202) 453-6012  
 TDD: 800-877-8339  
 E-mail: OCR@ed.gov  
 Web: <http://www.ed.gov/ocr>

#### U.S. Department of Education

Office for Civil Rights  
 Cleveland Office  
 1350 Euclid Avenue  
 Suite 325  
 Cleveland, Ohio 44115  
 (216) 522-4970  
 FAX: (216) 522-2573  
 TDD: (216) 522-4944  
 E-mail: OCR.Cleveland@ed.gov  
 Web: <http://www.ed.gov/ocr>

### Retaliation

Retaliation against a person who makes a report or files a complaint alleging unlawful harassment/retaliation or participates as a witness in an investigation is prohibited. Neither the Board nor any other person may intimidate, threaten, coerce or interfere with any individual because the person opposed any act or practice made unlawful by any Federal or State civil rights law, or because

that individual made a report, formal complaint, testified, assisted or participated or refused to participate in any manner in an investigation, proceeding, or hearing under those laws and/or this policy, or because that individual exercised, enjoyed, aided or encouraged any other person in the exercise or enjoyment of any right granted or protected by those laws and/or this policy.

Retaliation against a person for making a report of discrimination, filing a formal complaint, or participating in an investigation or meeting is a serious violation of this policy that can result in imposition of disciplinary sanctions/consequences and/or other appropriate remedies.

Formal complaints alleging retaliation may be filed according to the internal complaint process set forth above.

The exercise of rights protected under the First Amendment of the United States Constitution does not constitute retaliation prohibited under this policy.

Revised 7/10/14

Revised 11/12/15

Revised 6/10/21

Revised 12/8/22

T.C. 3/27/23

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Legal

- 29 C.F.R. Part 1630
- 29 U.S.C. 794, Section 504 Rehabilitation Act of 1973, as amended
- 34 C.F.R. Part 104
- 42 U.S.C. 12101 et seq., Americans with Disabilities Act of 1990, as amended

**Last Modified by Wayne Wright on October 20, 2025**

Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Vol. 40, No. 1 - Nondiscrimination - September 2025 Replacement NONDISCRIMINATION, EQUAL EMPLOYMENT OPPORTUNITY, AND ANTI-HARASSMENT
Code	po4122
Status	1st Reading
Adopted	September 13, 2012
Last Revised	March 27, 2023
Last Reviewed	March 13, 2026

### **Replacement Policy - Vol. 40, No. 1**

#### **4122 - NONDISCRIMINATION, EQUAL EMPLOYMENT OPPORTUNITY, AND ANTI-HARASSMENT**

The Board of Education does not discriminate on the basis of race, color, national origin, sex (including pregnancy, childbirth, and related medical conditions; sexual orientation; and gender identity), disability, age, religion, height, weight, marital or family status, military status, ancestry, genetic information, or any other legally protected category (collectively, Protected Classes) in its programs and activities, including employment opportunities.

The Board is committed to providing a work environment that is free from Prohibited Conduct, responding promptly and effectively when it has knowledge of conduct that reasonably may constitute Prohibited Conduct, and addressing Prohibited Conduct in its education programs or activities. This commitment applies to all District operations and this policy applies to Prohibited Conduct occurring within or as a part of the District's education programs and activities, whether on school property or at another location during an activity sponsored by the Board.

Persons who commit Prohibited Conduct are subject to the full range of disciplinary sanctions set forth in this policy.

The Board will provide persons who have experienced Prohibited Conduct with ongoing remedies as reasonably necessary to restore or preserve access to the District's education programs or activities.

All school employees share responsibility for avoiding, discouraging, and reporting any form of Prohibited Conduct.

The Board will take immediate action to address the following prohibited acts:

- A. Retaliating against a person who has made a report or filed a complaint alleging Prohibited Conduct, or has participated in the below-described grievance procedures.
- B. Filing a malicious or knowingly false report or complaint of Prohibited Conduct.
- C. Disregarding, failing to appropriately address, or delaying action to appropriately address allegations of Prohibited Conduct when responsibility for reporting and/or investigating such charges comprises part of one's administrative/supervisory duties.

#### **Definitions:**

Words used in this policy shall have those meanings defined herein; words not defined herein shall be construed according to their plain and ordinary meanings.

**Bullying** means: any unwanted and repeated written, verbal, or physical behavior, including any threatening, insulting, or dehumanizing gesture, by an adult, that is sufficiently severe or pervasive to create an intimidating, hostile, or offensive work environment; or unreasonably interfere with the individual's work performance or participation. It may involve: (a) threats; (b) intimidation; (c) stalking; (d) cyberstalking; (e) cyberbullying; (f) physical violence; (g) theft; (h) sexual, religious, or racial harassment; (i) public humiliation; or (j) destruction of property. Bullying rises to the level of unlawful harassment when one (1) or

more persons systematically and chronically inflict physical hurt or psychological distress on one (1) or more employees, and that bullying is based upon one (1) or more Protected Classes, that is, characteristics that are protected by Federal and/or State civil rights laws. Ordinary teasing, horseplay, arguments, and peer conflict do not constitute bullying for purposes of this policy.

**Complainant** means: an employee who is alleged to have been subjected to conduct that could constitute Prohibited Conduct; or a person, other than an employee, who is alleged to have been subjected to conduct that could constitute Prohibited Conduct and who was participating or attempting to participate in the District's education programs or activities at the time of the alleged Prohibited Conduct.

**Complaint** means: an oral or written request to the District that objectively can be understood as a request for the District to investigate and make a determination about alleged Prohibited Conduct.

**Day(s)**: Unless expressly stated otherwise, the term "day" or "days" as used in this policy means business day(s) (i.e., days that the Board office is open for normal operating hours, Monday – Friday, excluding State-recognized holidays).

**Disciplinary sanctions** means: consequences imposed on a respondent following a determination that the respondent engaged in Prohibited Conduct.

**Education programs or activities** refer to: all the District's operations including, but not limited to, in-person and online/remote educational instruction, employment, extracurricular activities, athletics, performances, and community engagement and outreach programs. The term applies to all programs and activities operated by the Board on school grounds or on other property owned or occupied by the Board. It also includes events and circumstances that take place off school property/grounds but over which the District asserts disciplinary authority (e.g., at off-campus activities sponsored by the Board).

**Exculpatory evidence** means: evidence that is favorable to a respondent because it helps excuse, justify, or absolve a respondent of alleged wrongdoing and tends to establish that a respondent did not engage in Prohibited Conduct.

**Genetic information** means: information about: (a) an individual's genetic tests; (b) the genetic tests of that individual's family members; (c) the manifestation of disease or disorder in family members of the individual (i.e., family medical history); (d) an individual's request for, or receipt of, genetic services, or the participation in clinical research that includes genetic services by the individual or a family member of the individual; or (e) the genetic information of a fetus carried by an individual or a pregnant woman who is a family member of the individual and the genetic information of an embryo legally held by an individual or family member using assistive reproductive technology.

**Harassment** means: any threatening, insulting, or dehumanizing gesture, use of technology, or written, verbal, or physical conduct directed against an employee that (a) places the employee in reasonable fear of harm to their person or damage to their property; (b) has the effect of substantially interfering with the employee's work performance; or (c) has the effect of substantially disrupting the orderly operation of a school. Each of the following types of harassment involves unwelcome physical, verbal, or nonverbal conduct that is based upon an individual's protected characteristic(s) and has the purpose or effect of interfering with the individual's work performance or creating an intimidating, hostile, or offensive work environment.

- A. **Age Harassment** means: harassment based on negative perceptions about older workers. It also includes harassment based on stereotypes about older workers, even if they are not motivated by animus, such as pressuring an older employee to transfer to a job that is less technology-focused because of the perception that older workers are not well-suited to such work or encouraging an older employee to retire.
- B. **Disability Harassment** means: harassment based upon a person's disability and includes harassment based upon stereotypes about individuals with disabilities in general or about an individual's particular disability. It also includes harassment based on traits or characteristics linked to an individual's disability, such as how the person speaks, looks, or moves. For example, negative comments about an individual's speech patterns, movement, physical impairments, or defects/appearances, or the like. Disability-based harassment includes: (a) harassment because an individual requests or receives reasonable accommodation; (b) harassment because an individual is regarded as having an impairment, even if the individual does not have an actual disability, or a record of disability; (c) harassment because an individual has a record of a disability, even if the individual currently does not have a disability; and (d) harassment based on the disability of an individual with whom the employee is associated. Finally, disability-based harassment may occur where conduct is directed at or pertains to a person's genetic information.
- C. **National Origin/Ancestry Harassment** means: harassment due to a person's (or their ancestor's) place of origin. Such harassing conduct can include ethnic slurs or epithets, derogatory comments about individuals of a particular nationality, and use of stereotypes about a person's national origin. Additionally, it can include harassment regarding traits or characteristics linked to an individual's national origin, such as physical characteristics, ethnic or cultural characteristics or customs (e.g., surnames, attire, or diet), or linguistic characteristics (e.g., a person's manner of speaking, non-English language accent, or a lack of fluency in English).
- D. **Race/Color Harassment** means: unwelcome physical, verbal, or nonverbal conduct that is based upon an individual's race or color and has the purpose or effect of interfering with the individual's work performance; or creating an intimidating, hostile, or offensive work environment. Such harassment may occur where conduct is directed at the characteristics of a person's race or color, such as racial slurs, nicknames implying stereotypes, epithets, and/or negative references relative to racial customs.

**E. Religious (Creed) Harassment** means: harassment based on a person's surname, religion (including atheism or lack of religious belief), religious traditions and practices, or religious dress/clothing, and includes making offensive comments about the same. It also includes religious slurs or epithets, harassing conduct based on religious stereotypes, and harassment associated with a person's request for and/or receipt of religious accommodation. Religious harassment also involves explicitly or implicitly coercing an employee to engage in religious practices at work.

**F. Sexual Harassment** means (for purposes of this policy and consistent with Title VII of the Civil Rights Act of 1964): unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature when: (a) submission to such conduct is made either implicitly or explicitly a term or condition of an individual's employment; (b) submission or rejection of such conduct by an individual is used as the basis for employment decisions affecting such individual; or (c) such conduct has the purpose or effect of interfering with the individual's work performance; or creating an intimidating, hostile, or offensive working environment. Sexual harassment may involve the behavior of a person of any gender against a person of the same or another gender.

1. Sexual Harassment covered by Policy 2266 - Nondiscrimination on the Basis of Sex in Education Programs or Activities is not included in this policy. Allegations of such conduct shall be addressed solely by Policy 2266.
2. Prohibited acts that constitute sexual harassment under this policy may take a variety of forms. Examples of the kinds of conduct that may constitute sexual harassment include, but are not limited to:
  - a. Conduct of a sexualized nature, such as unwanted conduct expressing sexual attraction or involving sexual activity (e.g., unwelcome sexual propositions, invitations, solicitations, and flirtations; unwanted physical and/or sexual contact, including unwelcome and inappropriate touching, patting, or pinching (  ); and obscene gestures [**END OF OPTION**].
  - b. Sexual attention or sexual coercion, such as demands or pressure for sexual favors (e.g., threats or insinuations that a person's employment, wages, or other conditions of employment may be adversely affected by not submitting to sexual advances; giving unwelcome personal gifts such as lingerie that suggest the desire for a romantic relationship; leering or staring at someone in a sexual way, such as staring at a person's breasts, buttocks, or groin).
  - c. Rape, sexual assault, or other acts of sexual violence.
  - d. Discussing or displaying visual depictions of sex acts or sexual remarks (e.g., unwelcome verbal expressions of a sexual nature, including graphic sexual commentaries about a person's body, dress, appearance, or sexual activities; the unwelcome use of sexually degrading language, profanity, jokes or innuendoes; unwelcome suggestive or insulting sounds or whistles; obscene telephone calls, texts, etc.; sexually suggestive objects, pictures, graffiti, videos, posters, audio recordings or literature placed in the work environment; asking or telling about sexual fantasies, sexual preferences, or sexual activities; speculations about a person's sexual activities or sexual history, or remarks about one's own sexual activities or sexual history).
  - e. A consensual sexual relationship where such relationship leads to favoritism of a subordinate employee with whom the superior is sexually involved and where such favoritism adversely affects other employees or otherwise creates a hostile work environment.
  - f. Verbal, nonverbal, or physical aggression, intimidation, or hostility based on sex or sex-stereotyping that does not involve conduct of a sexual nature.
  - g. Non-sexual conduct based on sex, such as sex-based epithets; sexist comments (such as remarks that women do not belong in management or that men do not belong in the nursing profession); or facially sex-neutral offensive conduct motivated by sex (such as bullying directed toward employees of one sex).
  - h. Harassment based on pregnancy, childbirth, or related medical condition, which may include issues pertaining to lactation, using or not using contraception, or deciding whether to have, or not to have, an abortion.

Not all behavior with sexual connotations constitutes unlawful sexual harassment. Sex-based or gender-based conduct must be objectively offensive (a reasonable person would find it hostile or abusive), subjectively offensive (the complainant actually perceived it as abusive), and either sufficiently severe (a single extremely serious incident) or pervasive (a pattern of behavior), such that it adversely affects, limits, or denies an individual's employment, or creates a hostile or abusive employment environment.

**Inculpatory evidence** means: evidence that links a respondent to alleged wrongdoing and tends to establish a respondent engaged in Prohibited Conduct (i.e., has culpability).

**Military status** means: a person's past, current, or future membership, service, or obligation in a uniformed service (e.g., Army, Marine Corps, Navy, Air Force, Space Force, Coast Guard, Public Health Service Commissioned Corps, and National Oceanic and Atmospheric Administration Commissioned Officer Corps). Service in the uniformed services also means the performance of duty, on a voluntary basis, or involuntary basis, in a uniformed service, under competent authority, and includes active duty, active duty for training, initial active duty for training, inactive duty for training, and full-time National Guard duty. It further includes the period of time for which a person is absent from employment for the purpose of an examination to determine the fitness of the person to perform any such duty as listed above.

**Party** means: a complainant or respondent.

**Pregnancy, childbirth, or related medical conditions** means:

- A. "Pregnancy" and "childbirth" refer to the pregnancy or childbirth of a specific employee and include, but are not limited to, current pregnancy; past pregnancy; potential or intended pregnancy (which can include infertility, fertility treatment, and the use of contraception); labor; and childbirth (including vaginal and cesarean delivery).
- B. "Related medical conditions" are medical conditions relating to the pregnancy or childbirth of a specific employee, and may include termination of pregnancy, including via miscarriage, stillbirth, or abortion; ectopic pregnancy; preterm labor; pelvic prolapse; nerve injuries; cesarean or perineal wound infection; maternal cardiometabolic disease; gestational diabetes; preeclampsia; HELLP (hemolysis, elevated liver enzymes and low platelets) syndrome; hyperemesis gravidarum; anemia; endometriosis; sciatica; lumbar lordosis; carpal tunnel syndrome; chronic migraines; dehydration; hemorrhoids; nausea or vomiting; edema of the legs, ankles, feet, or fingers; high blood pressure; infection; antenatal (during pregnancy) anxiety, depression, or psychosis; postpartum depression, anxiety, or psychosis; frequent urination; incontinence; loss of balance; vision changes; varicose veins; changes in hormone levels; vaginal bleeding; menstruation; and lactation and conditions related to lactation, such as low milk supply, engorgement, plugged ducts, mastitis, or fungal infections. The preceding list of related medical conditions is not exhaustive.

**Prohibited Conduct** means: unlawful discrimination or harassment based on a person's Protected Class(es) or retaliation. Such misconduct involves a violation of Federal and/or State civil rights laws.

**Relevant** means: related to the allegations of Prohibited Conduct under investigation as part of the Board's grievance procedures. Questions are relevant when they seek evidence that may aid in showing whether the alleged Prohibited Conduct occurred, and evidence is relevant when it may aid a decisionmaker in determining whether the alleged Prohibited Conduct occurred.

**Remedies** means: measures provided, as appropriate, to a complainant or any other person the District identifies as having had their equal access to the District's education programs or activities limited or denied by Prohibited Conduct. These measures are provided to restore or preserve that person's access to the District's education program or activity after the District determines that Prohibited Conduct occurred.

**Respondent** means: a person who is alleged to have engaged in Prohibited Conduct.

**Retaliation** means: intimidation, threats, coercion, or discrimination against any person by the District, a student, a Board employee, or any other person authorized by the Board to provide aid, benefit, or service under the District's education programs or activities, for the purpose of interfering with any right or privilege secured by Federal or State law, or because the person has reported information, made a complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing under applicable Federal or State laws or regulations.

**School District community** means: students and Board employees (i.e., administrators and professional and classified staff), as well as Board members, agents, volunteers, contractors, or other persons subject to the control and supervision of the Board.

**Supportive measures** means: non-disciplinary, non-punitive individualized services offered as appropriate, as reasonably available, without fee or charge to the complainant or the respondent before or after making a report or filing a complaint. Such measures are designed to restore or preserve that party's access to the District's education programs or activities without unreasonably burdening the other party, including measures designed to protect the safety of all parties or the District's educational environment or deter Prohibited Conduct. Supportive measures may include modifications of work schedules, mutual restrictions of contact between the parties, changes in work locations, leaves of absence, increased security and monitoring of certain work settings; training related to Prohibited Conduct, (  ) referral to Employee Assistance Program, [END OF OPTION] and other similar measures.

**Third Parties** means: guests and/or visitors on District property (e.g., visiting speakers, participants on opposing athletic teams, parents), vendors doing business with, or seeking to do business with, the Board, and other individuals who come in contact with members of the School District community at school-related events/activities (whether on or off District property).

### **Pregnancy, Childbirth, and Related Medical Conditions**

The Board will not discriminate against an employee based on the person's current pregnancy, potential or intent to become pregnant, past pregnancy, or medical condition related to pregnancy or childbirth, or because the person uses birth control, or has had or not had an abortion.

Additionally, the Board will provide a reasonable accommodation to an employee's known limitation related to pregnancy, childbirth, or a related medical condition, unless the accommodation will cause the District undue hardship.

The Board will treat pregnancy, childbirth, and related medical conditions as any other temporary medical conditions for all job-related purposes, including commencement, duration, and extensions of leave; accrual of seniority and any other benefit or service; reinstatement; and under any fringe benefit offered to employees by virtue of employment.

The Board will provide reasonable break time for an employee to express breast milk while at work for the first year after the

employee's child's birth. The Board will provide the employee with a space, other than a bathroom, that is clean, shielded from view, free from intrusion from coworkers and the public, and which the employee can use as needed to express breast milk. See Board Policy 6700 – Fair Labor Standards Act.

## **Nondiscrimination Based on Employee's Genetic Information**

The Board prohibits discrimination on the basis of genetic information in all aspects of employment, including hiring, firing, compensation, job assignments, promotions, layoffs, training, fringe benefits, or any other terms, conditions, or privileges of employment. The Board also does not limit, segregate, or classify employees in any way that would deprive or tend to deprive them of employment opportunities or otherwise adversely affect the status of an employee as an employee, based on genetic information. Harassment of a person because of the individual's genetic information is also prohibited. Likewise, retaliation against an applicant or employee for engaging in protected activity is prohibited.

In accordance with the Genetic Information Nondiscrimination Act ("GINA"), the Board shall not request, require, or purchase genetic information of employees, their family members, or applicants for employment. Further, in compliance with GINA, employees are directed not to provide any genetic information, including the individual's family medical history, in response to necessary requests for medical information, with the exception that family medical history may be acquired as part of the certification process for FMLA leave, when an employee is asking for leave to care for an immediate family member with a serious health condition. Applicants for employment are directed not to provide any genetic information, including the individual's family medical history, in response to requests for medical information as part of the District's application process.

~~[ ] The District recognizes that genetic information may be acquired through commercially and publicly available documents like newspapers, books, magazines, periodicals, television shows, or the Internet. The District prohibits, however, its employees from searching such sources with the intent of finding or obtaining genetic information or accessing sources from which they are likely to acquire genetic information. [END OF OPTION]~~

If the District either legally and/or inadvertently receives genetic information about an employee or applicant for employment from the employee, applicant for employment, or a medical provider, it shall be treated as a confidential medical record in accordance with law.

The District Compliance Officer (see below) shall be responsible for overseeing the District's compliance with applicable Federal regulations and promptly dealing with any inquiries or complaints. The District Compliance Officer or designee shall also verify that proper notice of nondiscrimination for Title II of the Genetic Information Nondiscrimination Act of 2008 is provided to staff members, and that all District requests for health-related information (e.g., to support an employee's request for reasonable accommodation under the Americans with Disabilities Act ("ADA") or a request for sick leave) is accompanied by a written warning that directs the employee or health care provider not to collect or provide genetic information. The warning shall read as follows:

The Genetic Information Nondiscrimination Act of 2008 ("GINA") prohibits employers and other entities covered by GINA Title II, including the Board of Education, from requesting or requiring genetic information of an individual or family member of the individual, except as specifically allowed by law. To comply with this law, do not provide any genetic information when responding to this request for medical information (unless the request pertains to a request for FMLA leave for purposes of caring for an immediate family member with a serious health condition). "Genetic information," as defined by GINA, includes an individual's family medical history, the results of an individual's or family member's genetic test, the fact that an individual or an individual's family member sought or received genetic services or participated in clinical research that includes genetic services, and genetic information of a fetus carried by an individual or an individual's family member or an embryo lawfully held by an individual or family member receiving assistive reproductive services.

~~[ ] The District offers health services ( ), including a wellness program [END OF INTERNAL OPTION]. Participation in the services/program is voluntary. Genetic information (such as family medical history) may be obtained as part of an individual's participation in the service/program. If that occurs, individual genetic information may be provided to the individual receiving the services and to the person's health services providers, but only genetic information in aggregate form will be provided to the Board. [END OF OPTION]~~

### **District Compliance Officer(s)**

#### **[DRAFTING NOTES:**

- 1. Neola suggests the Board appoint both a male and a female to serve as the District Compliance Officers. By appointing two (2) District Compliance Officers, there should always be a District Compliance Officer available to address a claim that pertains to the other District Compliance Officer. If, however, the Board appoints more than one (1) District Compliance Officer, Neola recommends that it designate one (1) of the District Compliance Officers to retain ultimate oversight over the assigned responsibilities and ensure the Board's consistent compliance with its responsibilities under applicable Federal and State laws that prohibit unlawful discrimination/harassment based on protected classes and retaliation. Alternatively, the Board could appoint a District Compliance Officer and one (1) or more persons to assist the District Compliance Officer with performance of the responsibilities identified in this policy and its accompanying administrative guidelines. Often the person(s) designated to assist a District Compliance Officer is/are called Deputy or Assistant Compliance Officer(s). If the Board elects this alternative approach, it would designate a District Compliance Officer for purposes of this policy, and then designate the other position(s) through its AG. The person(s) in the alternative support role(s) will need to be trained in the same manner as the District Compliance Officer (see**

2. The Board must list in this policy either the Name(s) or Title(s) of the District Compliance Officer(s); while the Board may list both the Name(s) and Title(s), Neola suggests that the Board only list the Title(s) in this policy (so the Board does not need to revise/amend the policy whenever there is a change in the actual person(s) holding the designated position(s)), but list both the Name(s) and Title(s) in the requisite notices/postings (e.g., website) and publications (e.g., handbooks). The District will also need to decide whether to list the Name(s) and Title(s), or just the Title(s), in Administrative Guideline 4122 if the District elects to identify the District Compliance Officer in the AG (see DRAFTING NOTE in the AG; again, if the District lists the Name(s) and Title(s), it will need to remember to update the AG whenever there is a change in the actual person(s) holding the designated position(s). No matter what, the Board will need to amend its policy and update its AG, requisite notices/postings, and publications, whenever it changes the Title of the position(s) designated to serve as the District Compliance Officer(s).

3. Reminder: Whenever a new person begins to serve as the District Compliance Officer (or in a support role to the District Compliance Officer), the District needs to make sure the new person is appropriately trained, in a timely manner, to fulfill the responsibilities of the position to which the person is assigned.]

**[END OF DRAFTING NOTES]**

The Board designates and authorizes the following individual(s) to coordinate its efforts to comply with the Board’s responsibilities under Federal and State laws that prohibit discrimination, including harassment, based on Protected Classes and retaliation (also known as “Civil Rights Coordinator(s)” or “Anti-Harassment Compliance Officer(s)”) (hereinafter referred to as the “District Compliance Officer(s)” or “CO(s)”):

\_\_\_\_\_  
\_\_\_\_\_  
{Name and/or School District Title}  
\_\_\_\_\_  
\_\_\_\_\_  
{Office Address}  
\_\_\_\_\_  
\_\_\_\_\_  
{Email Address}  
\_\_\_\_\_  
\_\_\_\_\_  
{Telephone Number}

Patrick Wolynski  
Executive Director Staff & Student Services  
248-435-8400 x1211  
800 Devillen, Royal Oak, MI 48073  
patrick.wolynski@royaloakschools.org

**[DRAFTING NOTE: The District may want to create a static (i.e., fixed) District Compliance Officer -specific email address and phone number that will not change when the person(s) and/or position(s) designated to be the CO(s) change(s) – e.g., CO4CivilRights@(insert District’s domain) – which the Technology Director/Department can program to be forwarded to the actual individual(s) serving as the District Compliance Officer(s) at any given time. Likewise, the District may want to establish a static Telephone Number for the position of District Compliance Officer that can be forwarded to, and accessed by, the actual person(s) serving in the CO position(s) at any given time. These two (2) steps will help reduce the information that needs to be updated in policy, AG, and/or the requisite notices/postings and publications when changes occur to the specific person(s)/position(s) designated to serve as the CO(s).]**

**[DRAFTING NOTE: Complete the following information if the Board appoints more than one (1) District Compliance Officer.]**

**[  ] [DESIGNATION OF A SECOND DISTRICT COMPLIANCE OFFICER]**

\_\_\_\_\_  
\_\_\_\_\_  
{Name and/or School District Title}  
\_\_\_\_\_  
\_\_\_\_\_  
{Office Address}  
\_\_\_\_\_  
\_\_\_\_\_  
{Email Address}  
\_\_\_\_\_  
\_\_\_\_\_  
{Telephone Number}

Katherine Abela  
Executive Director Finance and Facilities  
248-435-8400 x1232

[END OF OPTION]

[DRAFTING NOTE: As discussed above, if the Board designates more than one (1) CO, Neola recommends that the District select the following option.]

] The Board designates Patrick Wolynski, Executive Director Staff & Student Services \_\_\_\_\_ [DRAFTING NOTE: Insert Name and/or Title of the District Compliance Officer who is ultimately responsible for the District's compliance with its responsibilities under Federal and State laws that prohibit discrimination/harassment based on Protected Classes and retaliation as the individual who is ultimately responsible for oversight over the Board's compliance with applicable Federal and State laws and regulations that prohibit discrimination based on the basis of Protected Classes and retaliation. [END OF OPTION]

~~] The District Compliance Officer may delegate specific duties to one (1) or more designees. [END OF OPTION]~~

~~The contact information concerning the District Compliance Officer(s) will be published on the School District's website ( ) and annually [END OF OPTION]:~~

- ~~A. ( ) in parent/student and staff handbooks.~~
- ~~B. ( ) in the School District Annual Report to the public.~~
- ~~C. ( ) on each individual school's website.~~
- ~~D. ( ) in the School District's calendar.~~
- ~~E. ( ) \_\_\_\_\_.~~

[DRAFTING NOTE: The Board may want to select the following option when the Superintendent is not the CO. While Neola recognizes that this may not always be possible, it may be preferable to have the CO be someone other than the Superintendent because then – if the CO serves as the investigator and decisionmaker – the Superintendent can serve as the appeal decisionmaker or the facilitator for the informal resolution process.]

] The District Compliance Officer(s) shall report directly to the Superintendent except when the Superintendent is a party to a complaint (i.e., either the complainant or the respondent). Under such circumstances, the CO(s) shall report directly to [SELECT ONE OF THE FOLLOWING] ~~( ) the Board President~~  the Board's Legal Counsel ~~( ) \_\_\_\_\_~~ [OTHER] [END OF INTERNAL OPTIONS] until the matter in which the Superintendent is a party is concluded. [END OF OPTION]

Questions about this policy ~~( )~~  and AG 4122 [END OF OPTION] should be directed to the District Compliance Officer(s).

The CO(s) is/are responsible for coordinating the District's efforts to comply with applicable Federal and State laws and regulations, including the District's duty to address in a prompt and equitable manner any inquiries or complaints regarding discrimination, harassment, retaliation, or denial of equal opportunity/access. The CO(s) shall also verify that proper notice of nondiscrimination for Title II of the Americans with Disabilities Act (as amended), Title VI and Title VII of the Civil Rights Act of 1964, Section 504 of the Rehabilitation Act of 1973 (as amended), Genetic Information Nondiscrimination Act (GINA), and the Age Discrimination in Employment Act of 1975 is provided to staff members and the general public. ~~[ ] Any sections of the District's collective bargaining agreements dealing with hiring, promotion, demotion, discipline, and tenure need to contain a statement of nondiscrimination similar to that in the Board's statement set forth above. [END OF OPTION] [ ] In addition, as practical, gender specific terms should be eliminated from such contracts. [END OF OPTION] Copies of the laws and regulations listed above are available upon request from the CO(s).~~

The CO(s) will be available during regular work hours to discuss concerns related to Prohibited Conduct, to assist employees, other members of the District community, and third parties who seek support or advice when informing another individual about Prohibited Conduct, including unwelcome conduct, or to intercede informally on behalf of the individual in those instances where concerns have not resulted in the filing of a formal complaint and where all parties are in agreement to participate in an informal process.

The CO(s) shall monitor the District's education programs and activities for barriers to reporting information about conduct that reasonably may constitute Prohibited Conduct pursuant to Federal and/or State laws that prohibit discrimination/harassment based on the basis of a Protected Class/Category and retaliation, and take steps reasonably calculated to address such barriers.

**Notice of Nondiscrimination**

The Superintendent shall provide a notice of nondiscrimination to students, parents, guardians, or other authorized legal representatives of elementary and secondary students; employees; applicants for admission and employment; and all unions and professional organizations holding collective bargaining or professional agreements with the Board. Specifically, the Superintendent shall post the notice of nondiscrimination on the District's website and in each handbook, catalog, announcement, bulletin, and

application form that it makes available to the persons listed above, or which are otherwise used in connection with the recruitment of employees. (x) See AG 4122 and Form 4122F1 – Notice and Statement of Nondiscrimination. [END OF OPTION]

## NOTIFICATION/REPORTS OF PROHIBITED CONDUCT

Any person may provide information to the CO(s) concerning conduct that reasonably may constitute Prohibited Conduct. Such information may be submitted in person, by mail, by telephone, or by electronic mail using the CO's(s') published contact information, or by any other means (oral or written) that results in the CO(s) receiving the information. Information may be provided at any time (including during non-work hours). ~~[ ] Anonymous reports may be submitted using ( ) the online reporting form posted at \_\_\_\_\_ [insert the web address for the reporting form, or insert a hyperlink tied to the phrase "online reporting form"] [or] ( ) the hotline reporting number ( \_\_\_\_\_ [insert phone number]). [END OF OPTION]~~

All Board employees are required to notify the CO(s) of conduct that reasonably may constitute Prohibited Conduct. For the Board to fulfill its responsibilities under applicable Federal and/or State laws, if a Board employee has knowledge of conduct that reasonably may constitute Prohibited Conduct, the Board employee must notify the/a CO within two (2) business days of learning the information or receiving the report. [DRAFTING NOTE: The applicable statutes and regulations do not specify within how many days the Board employee must notify the CO of receiving notification/a report of Prohibited Conduct; Neola suggests "two (2) days". Alternatively, the Board could make this language more open-ended – e.g., "\*\* \* \* must immediately/promptly notify the/a CO of such information or report."] The Board employee must also comply with mandatory reporting responsibilities pursuant to Policy 8462 – Student Abuse and Neglect, if applicable. If the Board employee's knowledge about the alleged Prohibited Conduct is based on another individual bringing the information to the Board employee's attention, and the reporting individual submitted a written notification/report or complaint to the Board employee, the Board employee must provide the written notification/report or complaint to the CO.

Notification can be provided orally or in writing and should be as specific as possible. The person making the notification/report should, to the extent known, identify the alleged victim(s), perpetrator(s), and witness(es), and describe in detail what occurred, including date(s), time(s), and location(s).

If a notification/report or complaint involves allegations of Prohibited Conduct by or involving the CO, the person making the report (i.e., providing the notification or filing the complaint) should submit it to the Superintendent or another Board employee who, in turn, will notify the Superintendent of the report/complaint. The Superintendent will then serve in place of the CO for purposes of addressing that report of Prohibited Conduct. [DRAFTING NOTE: If the Superintendent is the CO, substitute "Board President" in place of "Superintendent."]

When a Board employee notifies the CO of suspected Prohibited Conduct, the employee is required to report all known details about the alleged Prohibited Conduct including: (1) the name of the alleged respondent(s); (2) the person who experienced the alleged Prohibited Conduct (i.e., the complainant); (3) other persons involved in the alleged Prohibited Conduct (e.g., witnesses); and (4) any other relevant facts, such as date, time, and location. Failure to provide such notification may result in discipline, up to and including suspension or termination of employment.

Any allegations of misconduct not involving Prohibited Conduct as defined in this policy will be addressed through the procedures outlined in other Board policies (x) and/or administrative guidelines [END OF OPTION], the applicable Student Code of Conduct, applicable collective bargaining agreement, and/or Employee/Administrator Handbook.

When a notification/report or complaint of Prohibited Conduct is made, the CO shall promptly (i.e., within two (2) business days [DRAFTING NOTE: The applicable laws and/or regulations do not define "promptly" or otherwise specify within how many days the contact has to be made; Neola suggests "two (2) days."] of the CO's receipt of the notification/report or complaint of Prohibited Conduct) contact the purported complainant to discuss the availability of supportive measures, consider the complainant's wishes with respect to supportive measures, inform the complainant of the availability of supportive measures with or without the filing of a complaint, and explain to the complainant the process for filing a complaint. The CO is responsible for coordinating the effective implementation of supportive measures. Any supportive measures provided to the complainant or respondent shall be maintained as confidential, to the extent that maintaining such confidentiality will not impair the ability of the District to provide the supportive measures.

## GRIEVANCE PROCEDURES

### Overview:

The Board adopts the following grievance procedures to provide for the prompt, effective, and equitable resolution of complaints made by employees, applicants, or other individuals who are participating or attempting to participate in the District's education programs or activities (i.e., members of the School District community and Third Parties), or by the CO alleging any act of Prohibited Conduct.

These grievance procedures shall be used for all complaints of Prohibited Conduct unless it involves conduct involving a student, in which case the grievance procedures set forth in Policy 2260 or Policy 5517.01 shall apply. These grievance procedures set forth the means for investigating and resolving claims involving such Prohibited Conduct; in particular, the procedures provide a method for assessing – in a prompt, effective, and equitable manner – whether an applicable Federal or State law was violated and, if it was, how best to end the Prohibited Conduct, prevent its recurrence, and remedy its effects.

Due to the sensitivity of complaints of Prohibited Conduct, timelines are flexible for initiating the grievance procedures; however, individuals are encouraged to file a complaint within thirty (30) days after the conduct occurs. Once the formal complaint process is begun, the investigation will be completed in a timely manner.

**[DRAFTING NOTE: Title VII of the Civil Rights Act of 1964 ("Title VII") prohibits discrimination in employment. Specifically, it prohibits employment discrimination based on race, color, religion, sex, or national origin, and applies to employers with fifteen (15) or more employees. Title IX, on the other hand, specifically prohibits discrimination based on sex in education programs and activities that receive Federal financial assistance, including employment within those institutions. Title IX is addressed by Board Policy 2266 and AG 2266. While both laws aim to prevent sex-based discrimination in the workplace, Title VII applies more broadly to various types of employers, whereas Title IX is limited to educational institutions receiving Federal funds. Ultimately, both laws aim to ensure equal employment opportunities and protect individuals from discrimination. When a District Compliance Officer receives a complaint or notification of alleged misconduct involving sex discrimination (in particular, sexual harassment) that involves an employee complainant and an employee respondent, the District Compliance Officer should consult with the Title IX Coordinator and/or the Board's Legal Counsel concerning which law – it may be both – the District will need to comply with when investigating the allegations.]**

Under all circumstances, the CO shall offer and coordinate supportive measures, as appropriate, in accordance with this policy (x) and AG 4122 **[END OF OPTION]**.

### **Complaints:**

The following people may make a complaint of Prohibited Conduct – i.e., request that the District investigate and determine whether Prohibited Conduct occurred:

A. a "complainant," which includes:

1. an employee of the District who is alleged to have been subjected to conduct that could constitute Prohibited Conduct; or
2. a person other than an employee of the District who is alleged to have been subjected to conduct that could constitute Prohibited Conduct at a time when that individual was participating or attempting to participate in the District's education programs or activities;

B. an authorized legal representative with the legal right to act on behalf of a complainant;

C. the District Compliance Officer.

A person is entitled to make a complaint of unlawful harassment only if they themselves are alleged to have been subjected to the unlawful harassment, or if the CO initiates a complaint.

**[DRAFTING NOTE: This paragraph emphasizes that in order for a person to file a complaint of unlawful harassment, the person has to have been subjected to the alleged misconduct directly or be a person who has a legal right to act on behalf of the person who was subjected to the alleged misconduct. This is consistent with the prior paragraph, where the complainant is identified as an employee who was "subjected to conduct that could constitute Prohibited Conduct." The following paragraph, on the other hand, expands who can file a complaint – when the alleged Prohibited Conduct does not involve unlawful harassment, or the complaint involves allegations of retaliation – to persons who are aware of the alleged Prohibited Conduct, even if that person was not directly affected by or subject to the alleged Prohibited Conduct.]**

With respect to complaints of Prohibited Conduct other than unlawful harassment, or complaints involving allegations of retaliation, in addition to the people listed above, the following persons have a right to make a complaint:

A. any employee of the District; or

B. any person other than an employee who was participating or attempting to participate in the District's education programs or activities at the time of the alleged Prohibited Conduct.

The District may consolidate complaints of Prohibited Conduct against more than one (1) respondent, or by more than one (1) complainant against one (1) or more respondents, or by one (1) party against another party, when the allegations of Prohibited Conduct arise out of the same facts or circumstances. When more than one (1) complainant or more than one (1) respondent is involved, references below to a party, complainant, or respondent include the plural, as applicable.

A person may file criminal charges simultaneously with filing a complaint. A person does not need to wait until the District's internal grievance procedures are completed before filing a criminal complaint. Likewise, questions or complaints relating to alleged violations of applicable Federal or State laws may be filed with the U.S. Department of Education's Office for Civil Rights, the U.S. Department of Justice's Civil Rights Division, the U.S. Equal Employment Opportunity Commission, or the Michigan Department of Civil Rights, at any time based on the underlying statutory basis for the complaint.

### **Basic Requirements:**

The District will treat complainants and respondents equitably.

All persons involved with implementing the grievance procedures and any other aspects of this Policy, including the District Compliance Officer, the investigator, the decisionmaker, and the appeal decisionmaker, ~~( )~~ and the facilitator of the informal resolution process, ~~[END OF OPTION]~~ shall be free from any conflicts of interest or bias for or against complainants or respondents generally or an individual complainant or respondent.

The CO may serve simultaneously as an investigator and/or a decisionmaker. ~~[END OF OPTION]~~ **[DRAFTING NOTE: Neola recommends the Board select this OPTION; note it is "may" (i.e., optional) so the CO can decide when to serve in both roles and when to designate one or more persons to perform these responsibilities in a given case.]**

If the CO does not intend to serve as the investigator/decisionmaker in a specific case, the CO shall designate one (1) or more administrators who are appropriately trained to serve in the role.

In circumstances when the CO and trained administrators do not have time/capacity to serve, or are prevented due to a conflict of interest, bias, or partiality, or other reasons impair the CO and other trained administrators from serving as an investigator/decisionmaker in a specific case, the CO shall , in consultation with ~~( )~~ and approval of ~~[END OF OPTION]~~ the Superintendent or ~~( )~~ Board  Board President (as appropriate), ~~[END OF OPTION]~~ secure one (1) or more independent third parties to serve as the investigator and/or decisionmaker.

The District presumes that the respondent is not responsible for the alleged Prohibited Conduct until a determination is made at the conclusion of its grievance procedures.

Under ordinary circumstances, the Board expects to complete the major stages of the grievance procedures within the timeframe specified below:

A. **Evaluation** – The District Compliance Officer will determine whether to dismiss a complaint or investigate it within ten (~~10~~) business ~~[INSERT AMOUNT]~~ days of receiving the complaint. **[DRAFTING NOTE: Neola recommends that the evaluation stage be completed within ten (10) days of the CO receiving notice of the complaint.]**

B. **Investigation** – The CO, or designated investigator/decisionmaker, shall ordinarily complete the investigation (i.e., collect relevant evidence that is not otherwise impermissible) and issue a Determination (i.e., consider the relevant and not otherwise impermissible evidence and decide whether Prohibited Conduct occurred) within twenty (20) business ~~[INSERT AMOUNT]~~ days of the CO determining the charges require investigation. **[DRAFTING NOTE: Recognizing that it is important for investigations to be completed and Determinations issued in a prompt and equitable manner, Neola recommends that a school district typically complete an investigation and issue a Determination within twenty (20) days.]**

**[DRAFTING NOTE: If the investigator/decisionmaker is someone other than the CO, upon written request from the investigator/decisionmaker, the CO should be permitted to approve a reasonable extension of time for the investigation to be completed and the Determination issued. If the CO is the investigation/decisionmaker: upon written request from the CO, the Superintendent should be permitted to approve a reasonable extension of time for the investigation to be completed and the Determination issued. In either situation, the administrator granting the extension should communicate to the parties the new deadline along with a rationale for the extension.]**

If, however, the CO, or designated investigator/decisionmaker, determines that the investigation is going to take longer, the CO will so notify the parties  and the Superintendent ~~[END OF OPTION]~~ and will thereafter keep the parties  and the Superintendent ~~[END OF OPTION]~~ informed of the status of the matter on a regular ~~[INSERT TIME PERIOD – E.G., BIWEEKLY OR REGULAR]~~ basis.

C. **Appeal** – A party filing an appeal of the CO's decision to dismiss a complaint , or the Determination, ~~[END OF OPTION]~~ must do so within five (5) business ~~[INSERT AMOUNT]~~ days of receiving the Dismissal (~~-x~~) or Determination ~~[END OF OPTION]~~. **[DRAFTING NOTE: Neola recommends the Board allow limited appeals based on the Determination. See DRAFTING NOTE below in the appeal section.]**

The CO, or the Superintendent if the CO is the individual requesting an extension, may approve reasonable extensions of the preceding timeframes on a case-by-case basis for good cause with notice to the parties.

The District will take reasonable steps to protect the privacy of the parties and witnesses.  These steps will not restrict the ability of the parties to present evidence or otherwise participate in the grievance procedures. ~~[END OF OPTION]~~ The parties shall not engage in retaliation, including against witnesses.

The CO, or designated investigator/decisionmaker, shall objectively evaluate all evidence that is relevant and not otherwise impermissible — including both inculpatory and exculpatory evidence. Credibility determinations shall not be based on a person's status as a complainant, respondent, or witness.

The following types of evidence, and questions seeking such evidence, are impermissible (i.e., will not be accessed or considered,

except by the District to determine whether one of the exceptions listed below applies; will not be disclosed; and will not otherwise be used), regardless of whether they are relevant:

- A. evidence that is protected under a privilege recognized by Federal or State law, unless the person to whom the privilege or confidentiality is owed voluntarily waived the privilege or confidentiality; and
- B. a party's or witness's records that are made or maintained by a physician, psychologist, or other recognized professional or paraprofessional in connection with the provision of treatment to the party or witness, unless the District obtains that party's or witness's voluntary, written consent for use in its grievance procedures.

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

Upon initiation of the Board's grievance procedures, the District Compliance Officer shall notify the parties of the following:

- A. the Board's grievance procedures (  ) and informal resolution process **[END OF OPTION]** associated with claims involving Prohibited Conduct; **[DRAFTING NOTE: Neola encourages the Board to include an informal resolution process.]**
- B. sufficient information available at the time to allow the parties to respond to the allegations, including the identities of the parties involved in the incident(s), the conduct alleged to constitute Prohibited Conduct, and the date(s) and location(s) of the alleged incident(s); and
- C. retaliation is prohibited.

Should the CO decide, at any point, to investigate allegations that are materially beyond the scope of the initial written notice, the CO will provide a supplemental written notice describing the additional allegations to be investigated.

#### **Dismissal of a Complaint:**

The CO may dismiss a complaint of Prohibited Conduct if:

- A. the District is unable to identify the respondent after taking reasonable steps to do so;
- B. the respondent is not participating in the District's education program or activity and is not employed by the Board;
- C. the complainant voluntarily withdraws any or all the allegations in the complaint, the CO declines to initiate a complaint, and the District determines that, without the complainant's withdrawn allegations, the conduct that remains alleged in the complaint, if any, would not constitute Prohibited Conduct even if proven; or
- D. the District determines the conduct alleged in the complaint, even if proven, would not constitute Prohibited Conduct. Before dismissing the complaint, the CO will make reasonable efforts to clarify the allegations with the complainant.

Upon dismissal, the CO will promptly notify, in writing, the complainant of the basis for the dismissal. If the dismissal occurs after the respondent has been notified of the allegations, the CO will also simultaneously notify, in writing, the respondent of the dismissal and the basis for the dismissal.

The CO will further notify the complainant that a dismissal may be appealed and will provide the complainant with an opportunity to appeal the dismissal of the complaint. If the dismissal occurs after the respondent has been notified of the allegations, then the CO will also notify the respondent that the dismissal may be appealed.

Dismissals may be appealed on the following bases:

- A. procedural irregularity that would change the outcome;
- B. new evidence that would change the outcome and that was not reasonably available when the dismissal was made; and
- C. the CO had a conflict of interest or bias for or against complainants or respondents generally, or the individual complainant or respondent, that would change the outcome.

If the dismissal is appealed, the CO will:

- A. notify the parties of any appeal, including notice of the allegations, if notice was not previously provided to the respondent;
- B. implement appeal procedures equally for the parties;
- C. ensure that the appeal decisionmaker did not take part in the original dismissal of the complaint;
- D. ensure that the appeal decisionmaker has been trained consistent with this Policy (  ) and AG 4122 **[END OF OPTION]**;
- E. provide the parties a reasonable and equal opportunity to make a statement in support of, or challenging, the outcome; and

F. notify the parties of the result of the appeal and the rationale for the result.

When a complaint is dismissed, the CO will, at a minimum:

- A. offer supportive measures to the complainant as appropriate;
- B. if the respondent has been notified of the allegations, offer supportive measures to the respondent as appropriate; and
- C. take other prompt and effective steps, as appropriate, to ensure that Prohibited Conduct does not continue or recur within the District's education programs or activities.

**[DRAFTING NOTE: Neola encourages the Board to select the following option so the CO can choose, in appropriate circumstances, to offer the parties the opportunity to participate in an informal resolution process, or to honor the parties' request to use an informal resolution process, to end the Prohibited Conduct, prevent its recurrence, and remedy its effects.]**

**[OPTIONAL LANGUAGE: INFORMAL RESOLUTION PROCESS]**

**Informal Resolution Process:**

In lieu of resolving a complaint through the Board's formal grievance procedures, the parties may instead elect to participate in an informal resolution process. The District will not offer informal resolution to resolve a complaint when such a process would conflict with Federal, State, or local law.

**[END OF OPTIONAL LANGUAGE: INFORMAL RESOLUTION PROCESS]**

**Adding Allegations and/or Consolidating Complaints:**

If, in the course of an investigation, the District decides to investigate additional allegations of Prohibited Conduct by the respondent toward the complainant that are not included in the original Notice of Allegations or to consolidate charges raised in a different complaint involving the same respondent, the CO will notify the parties of the additional allegations.

**Investigation:**

The District will provide for an adequate, reliable, and impartial investigation of complaints.

The burden is on the District — not on the parties — to conduct an investigation that gathers sufficient evidence to determine whether Prohibited Conduct occurred.

The CO, or the designated investigator/decisionmaker, will provide an equal opportunity for the parties to present fact witnesses and other inculpatory and exculpatory evidence that are relevant and not otherwise impermissible.

The CO, or the designated investigator/decisionmaker, will review all evidence gathered through the investigation and determine what evidence is relevant and what evidence is impermissible, regardless of relevance.

**Determination of Whether Prohibited Conduct Occurred:**

Following an investigation and evaluation of all relevant and not otherwise impermissible evidence, the CO or designated investigator/decisionmaker will:

- A. Use the preponderance of the evidence standard of proof to determine whether Prohibited Conduct occurred. This standard of proof requires the decisionmaker to evaluate relevant and not otherwise impermissible evidence for its persuasiveness. If the decisionmaker, applying the applicable standard, is not persuaded by the relevant and not otherwise impermissible evidence that Prohibited Conduct occurred, regardless of the quantity of the evidence, the decisionmaker will not determine that Prohibited Conduct occurred. **[DRAFTING NOTE: While a board of education could elect to use the "clear and convincing" evidence standard of proof, Neola does not recommend it. If a board does select the "clear and convincing" standard, it should use it in all other comparable proceedings. Neola expects it will be a rare situation when a board chooses to use a clear and convincing standard of proof.]**
- B. Notify the parties, in writing, of the determination whether Prohibited Conduct occurred, including the rationale for such determination (), and the procedures and permissible bases for the complainant and respondent to appeal **[END OF OPTION]**.
- C. Not impose discipline on a respondent for Prohibited Conduct unless there is a determination at the conclusion of the grievance procedures that the respondent engaged in Prohibited Conduct.
- D. If there is a determination that Prohibited Conduct occurred, the CO will, as appropriate:

- 1. coordinate the provision and implementation of remedies to a complainant and other people the District identifies as having had equal access to the District's education programs or activities limited or denied by the Prohibited Conduct;

2. coordinate the imposition of any disciplinary sanctions on a respondent (  ), including notification to the complainant of any such disciplinary sanctions **[END OF OPTION]**; and

3. take other appropriate prompt and effective steps to ensure that the Prohibited Conduct does not continue or recur within the District's education programs or activities.

E. Comply with the grievance procedures before the imposition of any disciplinary sanctions against a respondent.

F. Not discipline a party, witness, or others participating in the grievance procedures for making a false statement based solely on the determination of whether Prohibited Conduct occurred.

**[DRAFTING NOTE: If the CO dismisses a complaint in the Evaluation stage (i.e., prior to commencing an investigation), the complainant may appeal as set forth above. Neola also recommends the Board include an appeal process related to the Determination.]**

**[OPTIONAL LANGUAGE - APPEAL OF DETERMINATION]**

#### **Appeal of Determinations:**

If a party disagrees with the decisionmaker's determination as to whether Prohibited Conduct occurred, the party may file an appeal. Appeals must be submitted, in writing, within five (5) **business (INSERT AMOUNT)** days of the appealing party's receipt of the Determination.

A party may appeal a Determination on the following bases:

A. procedural irregularity that would change the outcome;

B. new evidence that would change the outcome and that was not reasonably available when the investigation occurred and the Determination was made; and

C. the CO, or the designated investigator/decisionmaker, had a conflict of interest or bias for or against complainants or respondents generally or the individual complainant or respondent that would change the outcome;

**[DRAFTING NOTE: The Board may insert additional grounds on which an appeal may be filed.]**

D. ~~( ) the recommended remedies (including disciplinary sanctions/consequences) are unreasonable in light of the findings of fact (i.e., the nature and severity of the Prohibited Conduct).~~

E. ~~( ) [OTHER] \_\_\_\_\_.~~

~~[ ] The complainant may not challenge the ultimate disciplinary sanction/consequence that is imposed. **[END OF OPTION]**~~

**[DRAFTING NOTE: The following options are offered in case the Board wants the Superintendent to serve as the appeal decisionmaker or the Board wants to nominally be identified as the appeal decisionmaker but will be delegating the responsibility to a person who is properly trained. Neola does not recommend that the Board itself be named as the appeal decisionmaker because of the preference for the decisionmaker to be trained to render a decision. If the Board wants to serve as the appeal decisionmaker, it should discuss this issue with its Legal Counsel. Select OPTION 1 or OPTION 2 below.]**

~~[ ] **[OPTION 1]**~~

~~The CO will designate an appeal decisionmaker, who will be a person who did not conduct the Investigation and render the Determination, and is appropriately trained ( ), as set forth in AG 4122 **[END OF INTERNAL OPTION]**.~~

~~The CO has authority ( ), in consultation with ( ) and approval of **[END OF OPTION]** the Superintendent or ( ) Board ( ) Board President (as appropriate), **[END OF OPTIONS]** to secure an independent Third Party to serve as the appeal decisionmaker.~~

~~[ ] In designating an appeal decisionmaker, the CO will work with the Board to identify and appoint an independent Third Party to serve as the appeal decisionmaker— this individual shall be considered to be the Board's designee and will submit the appeal decision to the Board who will promptly adopt it as written and forward it to the CO who will send it simultaneously to the parties. **[END OF OPTIONAL SENTENCE]**~~

~~**[END OF OPTION 1]**~~

**[OPTION 2]**

The Superintendent shall serve as the appeal decisionmaker, provided the Superintendent has not been otherwise involved in the grievance procedures (i.e., did not serve as the investigator/decisionmaker or informal resolution process facilitator) and is appropriately trained. If the Superintendent is not eligible to serve as the appeal decisionmaker, the CO will designate an appeal

decisionmaker, who will be a person who did not conduct the Investigation and render the Determination, and is appropriately trained (  ), as set forth in AG 4122 [END OF INTERNAL OPTION].

[END OF OPTION 2]

[END OF OPTIONS]

If a party appeals the Determination, the CO will:

- A. notify the parties of the appeal;
- B. implement appeal procedures equally for the parties;
- C. provide the parties a reasonable and equal opportunity to make a statement in support of, or challenging, the Determination;
- D. provide the appeal decisionmaker with the relevant and not otherwise impermissible evidence and the Determination; and
- E. notify the parties, in writing, of the result of the appeal and the appeal decisionmaker's rationale for the outcome.

**Parties Provided a Reasonable and Equal Opportunity to Make a Statement in Support of, or Challenging, the Dismissal (  ) or Determination [END OF OPTION]**

When a party files an appeal, the party must set forth the reason(s)/basis/bases for the appeal, and the other party will have five ( 5 ) business [INSERT AMOUNT] days to provide the appeal decisionmaker with a statement in support of their position. Once the decisionmaker receives the statement (or the deadline for filing such a statement expires), the appeal decisionmaker will have five ( 5 ) business [INSERT AMOUNT] days to issue a decision on the appeal.

**[DRAFTING NOTE: Neola suggests any appeals should be filed within five (5) days of the parties receiving written notice of the Determination. Neola further suggests that the timeline for the other party submitting a statement be equivalent to the timeframe in which an appeal has to be filed. Finally, Neola suggests the appeal decisionmaker have ten (10) days from receipt of the statements to issue a decision.]**

While a party appealing a Determination may argue the reason/basis for the appeal is that new evidence has been discovered/obtained that would change the outcome and that said new evidence was not reasonably available when the Determination was originally made, the party may not submit the new or additional evidence during the appeal process. Rather, the party appealing should identify/describe in detail the evidence, including how and when it was discovered/obtained, and explain why it was not reasonably available during the Investigation (i.e., prior to the Determination). If the appeal decisionmaker accepts the proffered explanation, the appeal decisionmaker should remand the case back to the investigator/decisionmaker (i.e., reopen the investigation) so the new evidence may be submitted and considered by the other party and the investigator/decisionmaker.

The appeal decisionmaker shall determine the outcome of the appeal based on the appeal decisionmaker's independent review of the record (i.e., the relevant and not otherwise impermissible evidence and the written determination) and the appeal decisionmaker's application of the law and Board policy to the facts in the record. The appeal decisionmaker must give due deference and due weight to the decisionmaker's factual findings and credibility determinations and should not overturn them unless non-testimonial extrinsic evidence in the record justifies a contrary conclusion or unless the record read in its entirety compels a contrary conclusion. Generally, the appeal decisionmaker is expected to uphold the original Determination unless the appeal decisionmaker concludes the original Determination is unlawful, unreasonable, or against the manifest weight of the evidence. Every reasonable presumption must be made in favor of the original Determination.

The appeal decisionmaker shall

**[DRAFTING NOTE: The Board must select either OPTION 1 or OPTION 2 unless the Board appointed an independent Third Party to serve as the Board's appeal decisionmaker, in which case the Board should select OPTION 3.]**

(  ) [OPTION 1]

simultaneously notify the parties, in writing, of the result of the appeal and the rationale for the outcome.

[END OF OPTION 1]

{OR}

(  ) [OPTION 2]

~~notify the CO, in writing, of the result of the appeal and the rationale for the outcome. The CO will then simultaneously notify the parties, in writing, of the result of the appeal and the appeal decisionmaker's rationale for the outcome.~~

~~[END OF OPTION 2]~~

~~{OR}~~

~~( )~~ [OPTION 3]

~~submit the appeal decision to the Board who will promptly adopt it as written and forward it to the CO, who will send it simultaneously to the parties. The appeal decision shall set forth the result of the appeal and the appeal decisionmaker's rationale for the outcome.~~

[END OF OPTION 3]

The  appeal decisionmaker's ~~( ) Board's~~ [END OF OPTION] decision shall be final.

[END OF OPTIONAL LANGUAGE - APPEAL OF DETERMINATION]

**Supportive Measures:**

The District will offer and coordinate supportive measures as appropriate for the complainant and/or respondent to restore or preserve that person's access to the District's education programs or activities or provide support during the grievance procedures and/or during the informal resolution process. For allegations of Prohibited Conduct other than prohibited harassment or retaliation, the District's provision of support measures does not require the District, Board employees, or any other person authorized to provide aid, benefit, or service on the District's behalf to alter the alleged discriminatory/retaliatory conduct for the purpose of providing a supportive measure.

The CO shall determine appropriate supportive measures on a case-by-case basis. Supportive measures may vary depending on what the CO deems to be reasonably available. Supportive measures may include, but are not limited to: modifications of work schedules, mutual restrictions on contact between the parties; changes in work locations; leaves of absence; increased security and monitoring of certain work settings; training related to Prohibited Conduct;  referral to Employee Assistance Program; [END OF OPTION] and other similar measures.

Supportive measures must not unreasonably burden either party and must be designed to protect the safety of the parties and/or the District's educational environment, or to provide support during the Board's grievance procedures or the informal resolution process.

The District will not impose such measures for punitive or disciplinary reasons.

The CO may, as appropriate, modify or terminate supportive measures at the conclusion of the grievance procedures, or at the conclusion of the informal resolution process, or the District may continue them beyond that point.

A party may seek additional modification or termination of a supportive measure applicable to them if circumstances change materially.

The District will not disclose information about any supportive measures to persons other than the person to whom they apply, including informing one party of supportive measures provided to another party, unless necessary to provide the supportive measure or restore or preserve a party's access to the District's education programs or activities, or as otherwise permitted under existing law and/or policy.

The Superintendent may place an employee respondent on administrative leave from employment responsibilities during the pendency of the Board's grievance procedures.

**Disciplinary Sanctions and Remedies:**

Following a determination that Prohibited Conduct occurred, the District may impose disciplinary sanctions, which may include:

- A.  oral or written warning;
- B.  written reprimands;
- C.  required counseling;
- D.  required training or education;
- E.  demotion;
- F.  suspension with pay;

[END OF OPTIONS]

- G. suspension without pay;
- H. termination; and

I. any other sanction authorized by any applicable Board policy, Employee/Administrator Handbook, and/or collective bargaining agreement.

The District may also provide remedies, which may include disciplinary sanctions/consequences. The CO will notify the Superintendent of the recommended remedies, so an authorized administrator can consider the recommendation and implement appropriate remedies in compliance with applicable due process procedures, whether statutory or contractual.

**[DRAFTING NOTE: The Board should review applicable policy(ies)/administrative guidelines/employee handbooks to determine whether changes are needed to establish timelines associated with imposition of discipline as a result of possible delays caused by the Board implementing the preceding grievance procedures; likewise, the Board may need to discuss with union representatives how implementation of the grievance procedures may impact any disciplinary provisions contained in applicable collective bargaining (e.g., timelines, permitted attendees at investigative interviews, etc.).]**

Discipline of an employee will be implemented in accordance with Federal and State law, Board policy, and applicable provisions of any relevant collective bargaining agreement.

### **Retaliation**

Retaliation against a person who makes a report or files a complaint alleging Prohibited Conduct or retaliation, or participates in an investigation, is prohibited. Neither the Board nor any other person may intimidate, threaten, coerce, or discriminate against any individual for the purpose of interfering with any right or privilege secured by the U.S. Constitution, the Michigan Constitution, Federal or State law, or this policy, or because the individual made a report or complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing under this policy. Intimidation, threats, coercion, or discrimination, including initiating a disciplinary process against a person for a code of conduct violation that does not involve Prohibited Conduct but arises out of the same facts and circumstances as a complaint or information reported about possible Prohibited Conduct, for the purpose of interfering with the exercise of any right or privilege secured by Federal or State law constitutes retaliation. Retaliation against a person for making a complaint or participating in an investigation is a serious violation of this policy that can result in the imposition of disciplinary sanctions/consequences and/or other appropriate remedies.

Complaints alleging retaliation may be filed according to the grievance procedures set forth above. The District shall initiate its grievance procedures upon receiving any complaint alleging retaliation.

The exercise of rights protected under the First Amendment of the United States Constitution does not constitute retaliation prohibited under this policy.

Charging an individual with a code of conduct violation for making a materially false statement in bad faith in the course of a grievance proceeding under this policy shall not constitute retaliation, provided, however, that a determination that Prohibited Conduct occurred, alone, is not sufficient to conclude that any party made a materially false statement in bad faith.

### **Privacy/Confidentiality**

The District will employ all reasonable efforts to protect the rights of the complainant, the respondent(s), and the witnesses as much as possible, consistent with the Board's legal obligations to investigate, to take appropriate action, and to conform with any discovery or disclosure obligations. The District will keep confidential the identity of any individual who has made a complaint of Prohibited Conduct, any complainant, any individual who has been reported to be the perpetrator of Prohibited Conduct, any respondent, and any witness, except as may be permitted by the Family Educational Rights and Privacy Act ("FERPA"), 20 U.S.C. 1232g, or FERPA regulations, 34 C.F.R. part 99, or as required by law, or to carry out the purposes of relevant Federal or State law or regulations, including the conduct of any investigation, hearing, or judicial proceeding arising thereunder (i.e., the District's obligation to maintain confidentiality shall not impair or otherwise affect the complainant's and respondent's receipt of the information to which they are entitled related to the investigation and determination of whether Prohibited Conduct occurred). All records generated under the terms of this policy shall be maintained as confidential to the extent permitted by law. Confidentiality, however, cannot be guaranteed. Additionally, the respondent must be provided the complainant's identity.

During an investigation, the CO or designated investigator/decisionmaker will instruct each person who is interviewed about the importance of maintaining confidentiality. Any individual who is interviewed as part of an investigation is expected not to disclose to other members of the School District Community or Third Parties any information that is learned or provided during the course of the investigation.

### **Sanctions and Monitoring**

The Board shall vigorously enforce its prohibitions against Prohibited Conduct by taking appropriate action reasonably calculated to stop and prevent further misconduct. While observing the principles of due process, a violation of this policy may result in disciplinary action up to and including the discharge of an employee. All disciplinary action will be taken in accordance with applicable State law and the terms of the relevant collective bargaining agreement(s). When imposing discipline, the Superintendent shall consider the totality of the circumstances involved in the matter. In those cases where Prohibited Conduct is not substantiated, the Board may consider whether the alleged conduct nevertheless warrants discipline in accordance with other Board policies, consistent with the terms of the relevant collective bargaining agreement(s).

When the Board becomes aware that a prior remedial action has been taken against a member of the School District community, all subsequent sanctions imposed by the Board and/or Superintendent shall be reasonably calculated to end such conduct, prevent its reoccurrence, and remedy its effects.

### **Application of the First Amendment**

The Board will construe and apply this policy consistent with the First Amendment to the U.S. Constitution ( ) and the principles of academic freedom as set forth in the applicable collective bargaining agreement **[END OF OPTION]**. In no case will a respondent be found to have committed Prohibited Conduct based on expressive conduct that is protected by the First Amendment (  ) and/or the principles of academic freedom specified in the Board's collective bargaining agreement with its teachers **[END OF OPTION]**.

### **Training**

All employees, investigators, decisionmakers, facilitators of informal resolution process, the District Compliance Officer(s), and other persons who are responsible for implementing the Board's grievance procedures or have the authority to modify or terminate supportive measures shall receive training related to their duties under applicable Federal and State laws and this policy.  The training shall be provided promptly upon hiring or a change of position that alters their duties under this policy, and annually thereafter. **[END OF OPTIONAL SENTENCE]** The training shall not rely on stereotypes involving Protected Classes.

~~Training materials will be made available for inspection upon request by members of the public. **[END OF OPTION]**~~

### **Recordkeeping (including retention of investigatory records and materials)**

The District Compliance Officer(s) is/are responsible for overseeing retention of all records that must be maintained pursuant to this policy. All individuals charged with conducting investigations under this policy must retain all information, documents, electronically stored information, and electronic media (as defined in Policy 8315) created and received as part of an investigation. Records and materials associated with the implementation of this policy shall be retained in accordance with Policy 8310, Policy 8315, Policy 8320, and Policy 8330 for the period set forth below, unless required to be maintained for a longer period pursuant to the District's records retention schedule.

**[DRAFTING NOTE: For purposes of uniformity, Neola recommends that the Board use the same seven (7) year period for recordkeeping that is required by the 2020 Title IX regulations - see Board Policy 2266; if the Board selects a different timeframe for maintaining the below specified records, it should verify the time period selected is consistent with and/or reflected in its record retention schedule – see AG 8310.]**

The District shall maintain for a period of seven (7) calendar years the following records:

- A. for each complaint of Prohibited Conduct, records documenting the informal resolution process and/or the grievance procedures followed and the resulting outcome;
- B. for each notification that the District Compliance Officer receives of information about conduct that reasonably may constitute Prohibited Conduct, records documenting the actions the District took to implement this policy; and
- C. all materials used to provide the training referenced above (  ) and in AG 4122 **[END OF OPTION]**.

The information, documents, ESI, and electronic media (as defined in Policy 8315) retained may include public records and records exempt from disclosure under Federal and/or State law (e.g., student records, medical records).

### **Outside Appointments, Dual Appointments, and Delegations**

The Board retains discretion to appoint suitably qualified persons who are not Board employees to fulfill any function of the Board under this policy including, but not limited to, District Compliance Officer, investigator, decisionmaker, appeal decisionmaker, or facilitator of the informal resolution process.

The Board also retains discretion to appoint two (2) or more persons to jointly fulfill the role of District Compliance Officer, investigator, decisionmaker, appeal decisionmaker, and facilitator of the informal resolution process.

The Superintendent may delegate functions assigned to a specific Board employee under this policy including, but not limited to, the functions assigned to the District Compliance Officer, investigator, decisionmaker, appeal decisionmaker, and facilitator of the informal resolution process to any suitably qualified individual, and such delegation may be rescinded by the Superintendent at any time.

**[DRAFTING NOTE: The following option expressly sets forth authority that the Board has, regardless of whether it is included in this policy, but is offered for those boards of education that may want to affirmatively communicate to/address these issues for readers of this policy.]**

### **Discretion in Application**

~~The Board retains discretion to interpret and apply this policy in a manner that is not clearly unreasonable, even if the Board's interpretation or application differs from the interpretation of any specific complainant and/or respondent.~~

Despite the Board's reasonable efforts to anticipate all eventualities in drafting this policy, it is possible that unanticipated or extraordinary circumstances may not be specifically or reasonably addressed by the express policy language, in which case the Board retains discretion to respond to the unanticipated or extraordinary circumstance in a way that is not clearly unreasonable.

The provisions of this policy are not contractual in nature, whether in their own right or as part of any other express or implied contract. Accordingly, the Board retains discretion to revise this policy at any time and for any reason. The Board may apply policy revisions to an active case provided that doing so is not clearly unreasonable.

**[END OF OPTION]**

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Legal

- M.C.L. 37.2101 et seq., 37.1101 et seq.
- 20 U.S.C. 1092(F)(6)(A)(v)
- 20 U.S.C. 1232g
- 20 U.S.C. Section 1681, Title IX of Education Amendment Act
- 20 U.S.C. Section 1701 et seq., Equal Educational Opportunities Act of 1974
- 20 U.S.C. Section 7905, Boy Scouts of America Equal Access Act
- 29 C.F.R. Part 1635
- 29 U.S.C. 201 et seq., The Fair Labor Standards Act ("FLSA")
- 29 U.S.C. 218d, PUMP for Nursing Mothers Act ("PUMP Act")
- 29 U.S.C. 621 et seq., Age Discrimination in Employment Act of 1967
- 29 U.S.C. 701 et seq. (in particular 794), Rehabilitation Act of 1973, as amended
- 34 C.F.R. Part 110 (7/27/93)
- 38 U.S.C. Chapter 43 4301-4335 (see in particular 4311(a) [prohibits discrimination based on military service] and 4312 [reemployment rights]), Uniformed Services Employment and Reemployment Rights Act ("USERRA")
- 42 U.S.C. 1983
- 42 U.S.C. 2000d et seq.
- 42 U.S.C. 2000e et seq., Civil Rights Act of 1964 (e.g., Title VI and Title VII), as amended by the Pregnancy Discrimination Act
- 42 U.S.C. 2000ff et seq., The Genetic Information Nondiscrimination Act
- 42 U.S.C. 2000gg, Pregnant Workers Fairness Act ("PWFA")
- 42 U.S.C. 6101 et seq., Age Discrimination Act of 1975
- 42 U.S.C. 12101 et seq., The Americans with Disabilities Act of 1990, as amended
- Fourteenth Amendment, U.S. Constitution

**Last Modified by Jennifer Perkins on March 19, 2026**

Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Copy of SECTION 504/ADA PROHIBITION AGAINST DISABILITY DISCRIMINATION IN EMPLOYMENT
Code	po4123
Status	1st Reading
Adopted	September 13, 2012
Last Revised	March 27, 2023
Last Reviewed	March 13, 2026

#### 4123 - **SECTION 504/ADA PROHIBITION AGAINST DISABILITY DISCRIMINATION IN EMPLOYMENT**

The Board of Education prohibits discrimination against any employee or applicant based upon **the employee's or applicant's** disability. As such, the Board will not engage in employment practices or adopt policies that discriminate on the basis of disability, or otherwise discriminate against qualified individuals with disabilities in regard to job application procedures, the hiring, advancement or discharge of employees, employee compensation, job training, or other terms, conditions and privileges of employment. The Board further will not limit, segregate or classify applicants or employees in any way that adversely affects their opportunities or status because of disability. Additionally, the Board will not participate in any contractual or other relationships that have the effect of subjecting qualified individuals with disabilities who are applicants or employees to discrimination on the basis of disability.

"An individual with a disability" means a person who has, had a record of, or is regarded as having, a physical or mental impairment that substantially limits one (1) or more major life activities. Major life activities are functions such as caring for one's self, performing manual tasks, walking, seeing, hearing, eating, sleeping, standing, lifting, bending, speaking, breathing, learning, reading, concentrating, thinking, communicating, sitting, reaching, interacting with others, and working.

Major life activities also include the operation of a major bodily function, including, but not limited to, functions of the immune system, special sense organs and skin, normal cell growth, and digestive, genitourinary, bowel, bladder, neurological, brain, respiratory, circulatory, endocrine, hemic, lymphatic, musculoskeletal and reproductive functions. The operation of a major bodily function includes the operation of an individual organ within a body system.

An impairment that is episodic in nature or in remission is considered a disability if it would substantially limit a major life activity when active.

The determination of whether an impairment substantially limits a major life activity must be made without regard to the ameliorative effects of mitigating measures such as medication, medical supplies, equipment or appliances, low-vision devices (defined as devices that magnify, enhance, or otherwise augment a visual image, but not including ordinary eyeglasses or contact lenses), prosthetics (including limbs and devices), hearing aid(s) and cochlear implant(s) or other implantable hearing devices, mobility devices, oxygen therapy equipment or supplies, use of assistive technology, reasonable accommodations or "auxiliary aids or services," learned behavioral or adaptive neurological modifications, psychotherapy, behavioral therapy, or physical therapy.

A qualified person with a disability means the individual satisfies the requisite skill, experience, education and other job-related requirements of the employment position such individual holds or desires and, with or without reasonable accommodation, can perform the essential functions of the job in question.

The Board will provide a reasonable accommodation to a qualified individual who has an actual disability or who has a record of a disability, unless the accommodation would impose an undue hardship on the operation of the District's program and/or activities. A reasonable accommodation is not required for an individual who is merely regarded as having a disability.

#### **Compliance Officer(s)**

The Board designates the following individual(s) to serve as the District's 504 Compliance Officer(s)/ADA Coordinator(s) (hereinafter referred to as the "District Compliance Officer(s)").

Patrick Wolynski  
Executive Director Staff & Student Services  
248-435-8400 x1211  
800 Devillen, Royal Oak, MI 48073  
patrick.wolynski@royaloakschools.org

Katherine Abela  
Executive Director Finance and Facilities  
248-435-8400 x1232  
800 Devillen, Royal Oak, MI 48073  
katherine.abela@royaloakschools.org

The names, titles, and contact information of these individuals will be published annually on the School District's web site.

The District Compliance Officer(s) are responsible for coordinating the District's efforts to comply with and fulfill its responsibilities under Section 504 and Title II of the Americans with Disabilities Act, as amended ("ADA"). A copy of Section 504 and the ADA, including copies of their implementing regulations, may be obtained from the District Compliance Officer(s).

The District Compliance Officer(s) will oversee the investigation of any complaints of discrimination based on disability, which may be filed pursuant to the Board's adopted internal complaint procedure, and will attempt to resolve such complaints. The Board will provide for the prompt and equitable resolution of complaints alleging violations of Section 504/ADA. See below.

### **Training**

The District Compliance Officer(s) will also oversee the training of employees in the District so that all employees understand their rights and responsibilities under Section 504 and the ADA, and are informed of the Board's policies, administrative guidelines and practices with respect to fully implementing and complying with the requirements of Section 504/ADA.

The Board will provide in-service training and consultation to staff responsible for the education of persons with disabilities, as necessary and appropriate.

### **Facilities**

No qualified person with a disability will, because the District's facilities are inaccessible to or unusable by persons with disabilities, be denied the benefits of, be excluded from participation in, or otherwise be subjected to discrimination under any program or activity to which Section 504/ADA applies.

For facilities constructed or altered after June 3, 1977, the District will comply with applicable accessibility standards. For those existing facilities constructed prior to June 3, 1977, the District is committed to operating its programs and activities so that they are readily accessible to persons with disabilities.

### **Notice**

Notice of the Board's policy on nondiscrimination in employment practices and the identity of the District's Compliance Officer(s) will be published on the District's website and posted throughout the District, and included the District's recruitment statements or general information publications.

### **Complaint Procedures**

If a person believes that **they have** ~~s/he~~ has been discriminated against on the basis of ~~his/her~~ disability, the person may utilize the following complaint procedures as a means of reaching, at the lowest possible administrative level, a prompt and equitable resolution of the matter.

In accordance with Section 504 of the Rehabilitation Act of 1973 and its implementing regulations ("Section 504"), employees will be notified of their right to file an internal complaint regarding an alleged violation, misinterpretation or misapplication of Section 504. In addition, employees will be notified of their right to file a complaint with the U.S. Department of Education's Office for Civil Rights.

Internal complaints must be put in writing and must identify the specific circumstances or areas of dispute that have given rise to the complaint, and offer possible solutions to the dispute. The complaint must be filed with a District Compliance Officer within the time limits specified below. The District's Compliance Officer is available to assist individuals in filing a complaint.

Unless expressly stated otherwise, the term "day" or "days" as used in this policy means business day(s) (i.e, a day(s) that the Board office is open for normal operating hours, Monday - Friday, excluding State-recognized holidays).

### **Internal Complaint Procedure**

The following internal complaint procedure is available to employees and equitable resolution of complaints alleging discrimination based upon disability. This complaint procedure is not available to unsuccessful applicants. Use of the internal complaint procedure is not a prerequisite to the pursuit of other remedies, including the filing of a complaint with the U.S. Department of Education's Office for Civil Rights.

- A. An employee with a complaint based on alleged discrimination on the basis of disability may first discuss the problem with the District Compliance Officer.
- B. If the informal discussion does not resolve the matter, or if the employee skips Step A, the individual may file a formal written complaint with the District Compliance Officer. The written complaint must contain the name and address of the individual or representative filing the complaint, be signed by the complainant or someone authorized to sign for the complainant, describe the alleged discriminatory action in sufficient detail to inform the District Compliance Officer of the nature and date of the alleged violation, and propose a resolution. The complaint must be filed within thirty (30) days of the circumstances or event giving rise to the complaint, unless the time for filing is extended by the District Compliance Officer for good cause.
- C. The District Compliance Officer will conduct an independent investigation of the matter (which may or may not include a hearing). This complaint procedure contemplates informal, but thorough investigations, affording all interested persons and their representatives, if any, an opportunity to present witnesses and other evidence relevant to the complaint. The District Compliance Officer will provide the complainant with a written disposition of the complaint within ten (10) days. If no decision is rendered within ten (10) days, or the decision is unsatisfactory in the opinion of the complainant, the employee may file, in writing, an appeal with the Superintendent. The District Compliance Officer shall maintain the District's files and records relating to the complaint.
- D. The Superintendent will, within ten (10) days of receiving the written appeal, conduct a hearing with all parties involved in an attempt to resolve the complaint.  
  
The Superintendent will render a his/her decision within ten (10) days of the hearing.
- E. The employee may be represented, at the employee's his/her own cost, at any of the above-described meetings/hearings.
- F. The right of a person to a prompt and equitable resolution of the complaint shall not be impaired by the person's pursuit of other remedies such as the filing of a complaint with the Office for Civil Rights or the filing of a court case. Use of this internal complaint procedure is not a prerequisite to the pursuit of other remedies.

If it is determined that the Complainant was subjected to unlawful discrimination, the CO must identify what corrective action will be taken to stop, remedy, and prevent the recurrence of the discrimination/retaliation. The corrective action should be reasonable, timely, age-appropriate and effective, and tailored to the specific situation.

## OCR Complaint

At any time, if an employee believes that they have s/he has been subjected to discrimination based upon his/her disability in violation of Section 504 or the ADA, the individual may file a complaint with the U.S. Department of Education's Office for Civil Rights ("OCR"). The OCR can be reached at:

### U.S. Department of Education

Office for Civil Rights  
Lyndon Baines Johnson Department of Education Building  
400 Maryland Ave., SW  
Washington, DC 20202-1100  
Telephone: (800) 421-3481  
FAX: (202) 453-6012  
TDD: 800-877-8339  
E-mail: OCR@ed.gov  
Web: <http://www.ed.gov/ocr>

U.S. Department of Education  
Office for Civil Rights  
Cleveland Office  
1350 Euclid Avenue  
Suite 325  
Cleveland, Ohio 44115  
(216) 522-4970  
FAX: (216) 522-2573  
TDD: (216) 522-4944  
E-mail: OCR.Cleveland@ed.gov  
Web: <http://www.ed.gov/ocr>

## Retaliation

Retaliation against a person who makes a report or files a complaint alleging unlawful harassment/retaliation or participates as a witness in an investigation is prohibited. Neither the Board nor any other person may intimidate, threaten, coerce or interfere with any individual because the person opposed any act or practice made unlawful by any Federal or State civil rights law, or because that individual made a report, formal complaint, testified, assisted or participated or refused to participate in any manner in an investigation, proceeding, or hearing under those laws and/or this policy, or because that individual exercised, enjoyed, aided or encouraged any other person in the exercise or enjoyment of any right granted or protected by those laws and/or this policy.

Retaliation against a person for making a report of discrimination, filing a formal complaint, or participating in an investigation or meeting is a serious violation of this policy that can result in imposition of disciplinary sanctions/consequences and/or other appropriate remedies.

Formal complaints alleging retaliation may be filed according to the internal complaint process set forth above.

The exercise of rights protected under the First Amendment of the United States Constitution does not constitute retaliation prohibited under this policy.

Revised 7/10/14  
Revised 11/12/15  
Revised 6/10/21  
Revised 12/8/22  
T.C. 3/27/23

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Legal

- 29 C.F.R. Part 1630
- 29 U.S.C. 794, Section 504 Rehabilitation Act of 1973, as amended
- 34 C.F.R. Part 104
- 42 U.S.C. 12101 et seq., Americans with Disabilities Act of 1990, as amended

**Last Modified by Jennifer Perkins on March 19, 2026**

Book	Policy Manual
Section	For the Board 40-1 Nondiscrimination
Title	Vol. 40, No. 1 - Nondiscrimination - September 2025 Rescind ANTI-HARASSMENT
Code	po4362
Status	
Adopted	September 13, 2012
Last Revised	March 27, 2023

### **Rescind Policy - Vol. 40, No. 1**

#### **4362 — ANTI-HARASSMENT**

##### **General Policy Statement**

It is the policy of the Board of Education to maintain an education and work environment that is free from all forms of unlawful harassment, including sexual harassment. This commitment applies to all School District operations, programs, and activities. All students, administrators, teachers, staff, and all other school personnel share responsibility for avoiding, discouraging, and reporting any form of unlawful harassment. This policy applies to unlawful conduct occurring on school property, or at another location if such conduct occurs during an activity sponsored by the Board.

The Board will vigorously enforce its prohibition against harassment based on race, color, national origin, sex (including sexual orientation and gender identity), disability, age (except as authorized by law), religion, height, weight, marital or family status, military status, ancestry, or genetic information (collectively, Protected Classes) that are protected by Federal civil rights laws (hereinafter referred to as unlawful harassment) and encourages those within the School District community, as well as Third Parties, who feel aggrieved to seek assistance to rectify such problems. The Board will investigate all allegations of harassment and in those cases where unlawful harassment is substantiated, the Board will take immediate steps to end the harassment, prevent its recurrence, and remedy its effects. Individuals who are found to have engaged in unlawful harassment will be subject to appropriate disciplinary action.

[ ] The District will offer counseling services to any person found to have been subjected to unlawful harassment, and, where appropriate, the person(s) who committed the unlawful harassment.

##### **Other Violations of the Anti-Harassment Policy**

The Board will also take immediate steps to impose disciplinary action on individuals engaging in any of the following prohibited acts:

- A. Retaliating against a person who has made a report or filed a complaint alleging unlawful harassment, or who has participated as a witness in a harassment investigation.
- B. Filing a malicious or knowingly false report or complaint of unlawful harassment.
- C. Disregarding, failing to investigate adequately, or delaying investigation of allegations of harassment, when responsibility for reporting and/or investigating unlawful harassment charges comprises part of one's supervisory duties.

##### **Definitions**

Words used in this policy shall have those meanings defined herein; words not defined herein shall be construed according to their plain and ordinary meanings.

**Complainant** is the individual who alleges or is alleged to have been subjected to unlawful harassment, regardless of whether the person files a formal complaint or is pursuing an informal resolution to the alleged harassment.

**Respondent** is the individual who has been alleged to have engaged in unlawful harassment, regardless of whether the Reporting Party files a formal complaint or is seeking an informal resolution to the alleged harassment.

**School District community** means students and Board employees (i.e., administrators and professional and support staff), as well as Board members, agents, volunteers, contractors, or other persons subject to the control and supervision of the Board.

**Third Parties** include, but are not limited to, guests and/or visitors on School District property (e.g., visiting speakers, participants on opposing athletic teams, parents), vendors doing business with or seeking to do business with the Board, and other individuals who come in contact with members of the School District community at school-related events/activities (whether on or off District property).

**Day(s)**: Unless expressly stated otherwise, the term "day" or "days" as used in this policy means business day(s) (i.e., a day(s) that the Board office is open for normal operating hours, Monday—Friday, excluding State recognized holidays).

### **Bullying**

Bullying rises to the level of unlawful harassment when one (1) or more persons systematically and chronically inflict physical hurt or psychological distress on one (1) or more students or employees and that bullying is based upon one (1) or more Protected Classes, that is, characteristics that are protected by Federal civil rights laws. It is defined as any unwanted and repeated written, verbal, or physical behavior, including any threatening, insulting, or dehumanizing gesture, by an adult or student that is severe or pervasive enough to create an intimidating, hostile, or offensive educational or work environment; cause discomfort or humiliation; or unreasonably interfere with the individual's school or work performance or participation; and may involve:

- A. teasing;
- B. threats;
- C. intimidation;
- D. stalking;
- E. cyberstalking;
- F. cyberbullying;
- G. physical violence;
- H. theft;
- I. sexual, religious, or racial harassment;
- J. public humiliation; or
- K. destruction of property.

**Harassment** means any threatening, insulting, or dehumanizing gesture, use of technology, or written, verbal, or physical conduct directed against a student or school employee that:

- A. places a student or school employee in reasonable fear of harm to his/her person or damage to his/her property;
- B. has the effect of substantially interfering with a student's educational performance, opportunities, or benefits, or an employee's work performance; or
- C. has the effect of substantially disrupting the orderly operation of a school.

### **Sexual Harassment**

For purposes of this policy and consistent with Title VII of the Civil Rights Act of 1964, sexual harassment is defined as:

Unwelcome sexual advances, requests for sexual favors, and other verbal or physical conduct of a sexual nature, when:

- A. Submission to such conduct is made either implicitly or explicitly a term or condition of an individual's employment, or status in a class, educational program, or activity.
- B. Submission or rejection of such conduct by an individual is used as the basis for employment or educational decisions affecting such individual.
- C. Such conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity.

Sexual harassment may involve the behavior of a person of any gender against a person of the same or another gender.

Sexual Harassment covered by Policy 2266—Nondiscrimination on the Basis of Sex in Education Programs or Activities is not included in this policy. Allegations of such conduct shall be addressed solely by Policy 2266.

Prohibited acts that constitute sexual harassment under this policy may take a variety of forms. Examples of the kinds of conduct that may constitute sexual harassment include, but are not limited to:

- A. Unwelcome sexual propositions, invitations, solicitations, and flirtations.
- B. Unwanted physical and/or sexual contact.
- C. Threats or insinuations that a person's employment, wages, academic grade, promotion, classroom work or assignments, academic status, participation in athletics or extra-curricular programs, activities, or events, or other conditions of employment or education may be adversely affected by not submitting to sexual advances.
- D. Unwelcome verbal expressions, including graphic sexual commentaries about a person's body, dress, appearance, or sexual activities; the unwelcome use of sexually degrading language, profanity, jokes, or innuendoes; unwelcome suggestive or insulting sounds or whistles; obscene telephone calls.
- E. Sexually suggestive objects, pictures, graffiti, videos, posters, audio recordings, or literature placed in the work or educational environment that may reasonably embarrass or offend individuals.
- F. Unwelcome and inappropriate touching, patting, or pinching; obscene gestures.
- G. Asking about, or telling about, sexual fantasies, sexual preferences, or sexual activities.
- H. Speculations about a person's sexual activities or sexual history, or remarks about one's own sexual activities or sexual history.
- I. Giving unwelcome personal gifts such as lingerie that suggest the desire for a romantic relationship.
- J. Leering or staring at someone in a sexual way, such as staring at a person's breasts, buttocks, or groin.
- K. A pattern of conduct, which can be subtle in nature, that has sexual overtones and is intended to create or has the effect of creating discomfort and/or humiliation to another.
- L. In the context of employees, consensual sexual relationships where such relationship leads to favoritism of a subordinate employee with whom the superior is sexually involved and where such favoritism adversely affects other employees or otherwise creates a hostile work environment.
- M. Inappropriate boundary invasions by a District employee or other adult member of the School District community into a student's personal space and personal life.
- N. Verbal, nonverbal, or physical aggression, intimidation, or hostility based on sex or sex stereotyping that does not involve conduct of a sexual nature.

Not all behavior with sexual connotations constitutes unlawful sexual harassment. Sex-based or gender-based conduct must be sufficiently severe, pervasive, and persistent such that it adversely affects, limits, or denies an individual's employment or education, or such that it creates a hostile or abusive employment or educational environment.

**[DRAFTING NOTE: Sexual conduct/relationships with students by District employees or any other adult member of the School District community is prohibited, and any teacher, administrator, coach, or other school authority who engages in sexual conduct with a student may also be guilty of the criminal charge of sexual battery. The issue of consent is irrelevant in regard to such criminal charge and/or with respect to the application of this policy to District employees or other adult members of the School District community.]**

### **Race/Color Harassment**

Prohibited racial harassment occurs when unwelcome physical, verbal, or nonverbal conduct is based upon an individual's race or color and when the conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working, and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity. Such harassment may occur where conduct is directed at the characteristics of a person's race or color, such as racial slurs, nicknames implying stereotypes, epithets, and/or negative references relative to racial customs.

### **Religious (Creed) Harassment**

Prohibited religious harassment occurs when unwelcome physical, verbal, or nonverbal conduct is based upon an individual's religion or creed and when the conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity. Such harassment may occur where conduct is directed at the characteristics of a person's religious tradition, clothing, or surnames, and/or involves religious slurs.

### **National Origin/Ancestry Harassment**

Prohibited national origin/ancestry harassment occurs when unwelcome physical, verbal, or nonverbal conduct is based upon an individual's national origin or ancestry and when the conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity. Such harassment may occur where conduct is directed at the characteristics of a person's national origin or ancestry, such as negative comments regarding customs, manner of speaking, language, surnames, or ethnic slurs.

### **Disability Harassment**

Prohibited disability harassment occurs when unwelcome physical, verbal, or nonverbal conduct is based upon an individual's disability and when the conduct has the purpose or effect of interfering with the individual's work or educational performance; creating an intimidating, hostile, or offensive working and/or learning environment; or interfering with one's ability to participate in or benefit from a class or an educational program or activity. Such harassment may occur where conduct is directed at the characteristics of a person's disability, such as negative comments about speech patterns, movement, physical impairments or defects/appearances, or the like. Such harassment may further occur where conduct is directed at or pertains to a person's genetic information.

### **Anti-Harassment Compliance Officers**

The following individual(s) shall serve as the District's Anti-Harassment Compliance Officer(s) (hereinafter, "the Compliance Officer(s)"):

**[DRAFTING NOTE: Neola suggests the Board appoint both a male and a female Compliance Officer in order to provide Complainants with the option to report their concerns to an individual of the gender with which they feel most comfortable. The same individual(s) assigned to serve as Compliance Officer(s) may also be assigned to serve as the District's Section 504 Compliance Officer(s)/ADA Coordinator(s) and/or Title IX Coordinator(s). Additionally, by appointing two (2) Compliance Officers, there should also be a Compliance Officer available to investigate a claim of harassment that pertains to the other Compliance Officer.]**

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(School District Title)

\_\_\_\_\_  
(Telephone Number)

\_\_\_\_\_  
(Office Address)

\_\_\_\_\_  
(E-mail Address)

\_\_\_\_\_  
(Name)

\_\_\_\_\_  
(School District Title)

\_\_\_\_\_  
(Telephone Number)

\_\_\_\_\_  
(Office Address)

\_\_\_\_\_  
(E-mail Address)

The names, titles, and contact information of these individuals will be published annually on the School District's website ( ) and:

- A. ( ) in the parent and staff handbooks.
- B. ( ) in the School District Annual Report to the public.
- C. ( ) on each individual school's website.
- D. ( ) in the School District's calendar.
- E. ( ) \_\_\_\_\_

The Compliance Officer(s) ( ) is ( ) are responsible for coordinating the District's efforts to comply with applicable Federal and State laws and regulations, including the District's duty to address in a prompt and equitable manner any inquiries or complaints regarding harassment.

The Compliance Officer(s) will be available during regular school/work hours to discuss concerns related to unlawful harassment, to assist students, other members of the District community, and third parties who seek support or advice when informing another individual about unwelcome conduct, or to intercede informally on behalf of the individual in those instances where concerns have not resulted in the filing of a formal complaint and where all parties are in agreement to participate in an informal process.

The Compliance Officers shall accept reports of unlawful harassment directly from any member of the School District community or a Third Party or receive reports that are initially filed with an administrator, supervisor, or other District level official. Upon receipt of a report of alleged harassment, the Compliance Officer(s) will contact the Complainant and begin either an informal or formal complaint process (depending on the request of the Complainant or the nature of the alleged harassment) or the Compliance Officer(s) will designate a specific individual to conduct such a process. The Compliance Officer(s) will provide a copy of this policy to the Complainant and Respondent. In the case of a formal complaint, the Compliance Officer(s) will prepare recommendations for the Superintendent or will oversee the preparation of such recommendations by a designee. All Board employees must report incidents of harassment that are reported to them to a Compliance Officer within two (2) days of learning of the incident.

Any Board employee who directly observes unlawful harassment is obligated, in accordance with this policy, to report such observations to a Compliance Officer within two (2) days. Additionally, any Board employee who observes an act of unlawful harassment is expected to intervene to stop the harassment unless circumstances make such an intervention dangerous, in which case the staff member should immediately notify other Board employees and/or local law enforcement officials, as necessary, to stop the harassment. Thereafter, the Compliance Officer(s) or designee must contact the Complainant if age eighteen (18) or older, or the Complainant's parents/guardians if the Complainant is under the age of eighteen (18), within two (2) days to advise of the Board's intent to investigate the alleged wrongdoing.

### **Reports and Complaints of Harassing Conduct**

Members of the School District community, along with Third Parties, are encouraged to promptly report incidents of harassing conduct to an administrator, supervisor, or other School District official so that the Board may address the conduct before it becomes severe, pervasive, or persistent. Any administrator, supervisor, or other District official who receives such a report shall file it with a Compliance Officer within two (2) days of receiving the report of harassment.

Members of the School District community and Third Parties who believe they have been unlawfully harassed by another member of the School District community or a Third Party are entitled to utilize the Board's complaint process that is set forth below. Initiating a complaint, whether formally or informally, will not adversely affect the Complainant's employment or participation in educational or extra-curricular programs. While there are no time limits for initiating complaints of harassment under this policy, individuals should make every effort to file a complaint as soon as possible after the conduct occurs while the facts are known and potential witnesses are available.

If, during an investigation of alleged bullying, aggressive behavior, and/or harassment in accordance with Policy 5517.01—Bullying and Other Forms of Aggressive Behavior, the Principal believes that the reported misconduct may have created a hostile work environment and may have constituted unlawful discriminatory harassment based on a Protected Class, the Principal will report the act of bullying, aggressive behavior, and/or harassment to the Compliance Officer(s) who shall investigate the allegation in accordance with this policy. If the alleged harassment involves Sexual Harassment as defined by Policy 2266, the matter will be handled in accordance with the grievance process and procedures outlined in Policy 2266. While the Compliance Officer investigates the allegation, or the matter is being addressed pursuant to Policy 2266, the Principal shall suspend the Policy 5517.01 investigation to await the Compliance Officer's written report or the determination of responsibility pursuant to Policy 2266. The Compliance Officer shall keep the Principal informed of the status of the Policy 4362 investigation and provide the Principal with a copy of the resulting written report. Likewise, the Title IX Coordinator will provide the Principal with the determination of responsibility that results from the Policy 2266 grievance process.

### **Investigation and Complaint Procedure (See Form 4362-F1)**

Except for Sexual Harassment that is covered by Policy 2266—Nondiscrimination on the Basis of Sex in Education Programs or Activities, any employee or other member of the School District community or Third Party (e.g., visitor to the District) who believes that they have been subjected to unlawful harassment may seek resolution of the complaint through the procedures described below. The formal complaint process involves an investigation of the Complainant's claims of harassment or retaliation and a process for rendering a decision regarding whether the charges are substantiated.

Due to the sensitivity surrounding complaints of unlawful harassment, timelines are flexible for initiating the complaint process; however, individuals should make every effort to file a complaint within thirty (30) days after the conduct occurs while the facts are known and potential witnesses are available. Once the formal complaint process is begun, the investigation will be completed in a timely manner (ordinarily, within fifteen (15) business days of the complaint being received).

The procedures set forth below are not intended to interfere with the rights of any individual to pursue a complaint of unlawful harassment or retaliation with the United States Department of Education Office for Civil Rights and/or Equal Employment Opportunity Commission (EEOC).

### **Informal Complaint Procedure**

The goal of the informal complaint procedure is to promptly stop inappropriate behavior and to facilitate resolution through an informal means, if possible. The informal complaint procedure is provided as a less formal option for a student, other member of the School District community, or Third Party who alleges unlawful harassment or retaliation. This informal procedure is not required as a precursor to the filing of a formal complaint. The informal process is only available in those circumstances where the Complainant and the Respondent mutually agree to participate in it.

The Complainant may proceed immediately to the formal complaint process and individuals who seek resolution through the informal procedure may request that the informal process be terminated at any time to move to the formal complaint process.

All complaints involving a District employee, any other adult member of the School District community, or a Third Party and a student will be formally investigated.

As an initial course of action, if a Complainant feels comfortable and safe in doing so, the individual should tell or otherwise inform the Respondent that the allegedly harassing conduct is unwelcome and must stop. The Complainant should address the allegedly harassing conduct as soon after it occurs as possible. The Compliance Officers are available to support and counsel individuals when taking this initial step or to intervene on behalf of the Complainant if requested to do so. A Complainant who is uncomfortable or unwilling to directly approach the Respondent about the alleged inappropriate conduct may file an informal or a formal complaint. In addition, with regard to certain types of unlawful harassment, such as sexual harassment, the Compliance Officer may advise against the use of the informal complaint process.

A complainant may make an informal complaint, either orally or in writing: 1) to a teacher, other employee, or building administrator; 2) directly to one (1) of the Compliance Officers; and/or 3) to the Superintendent or other District level employee.

All informal complaints must be reported to one (1) of the Compliance Officers, who will either facilitate an informal resolution as described below or appoint another individual to facilitate an informal resolution.

The Board's informal complaint procedure is designed to provide employees, other members of the School District community, or third parties who believe they are being unlawfully harassed with a range of options designed to bring about a resolution of their concerns. Depending upon the nature of the complaint and the wishes of the Complainant, informal resolution may involve, but not be limited to, one (1) or more of the following:

- A. Advising the Complainant about how to communicate the unwelcome nature of the behavior to the Respondent.
- B. Distributing a copy of this policy as a reminder to the individuals in the school building or office where the Respondent works or attends.
- C. If both parties agree, the Compliance Officer may arrange and facilitate a meeting or mediation between the Complainant and the Respondent to work out a mutual resolution.

While there are no set time limits within which an informal complaint must be resolved, the Compliance Officer/designee is directed to attempt to resolve all informal complaints within fifteen (15) business days of receiving the informal complaint. If the Complainant is dissatisfied with the informal complaint process, the Complainant may proceed to file a formal complaint. And, as stated above, either party may request that the informal process be terminated at any time to move to the formal complaint process.

### **Formal Complaint Procedure**

If a complaint is not resolved through the informal complaint process, if one of the parties has requested that the informal complaint process be terminated to move to the formal complaint process, or the Complainant, from the outset, elects to file a formal complaint, or the CO determines the allegations are not appropriate for resolution through the informal process, the formal complaint process shall be implemented.

The Complainant may file a formal complaint, either orally or in writing, with a teacher, Principal, Compliance Officer, the Superintendent, or other District official. Due to the sensitivity surrounding complaints of unlawful harassment and retaliation, timelines are flexible for initiating the complaint process; however, individuals should make every effort to file a formal complaint within thirty (30) days after the conduct occurs while the facts are known and potential witnesses are available. If a Complainant informs a teacher, Principal, Superintendent, or other District official, either orally or in writing, about any complaint of harassment or retaliation, that employee must report such information to a Compliance Officer/designee within two (2) business days.

Throughout the course of the process, the Compliance Officer should keep the parties reasonably informed of the status of the investigation and the decision-making process.

All formal complaints must include the following information to the extent known: the identity of the Respondent; a detailed description of the facts upon which the complaint is based (i.e., when, where, and what occurred); a list of potential witnesses; and the resolution sought by the Complainant.

If the Complainant is unwilling or unable to provide a written statement including the information set forth above, the Compliance Officer shall ask for such details in an oral interview. Thereafter, the Compliance Officer will prepare a written summary of the oral interview and the Complainant will be asked to verify the accuracy of the reported charge by signing the document.

Upon receiving a formal complaint, the Compliance Officer will consider whether any action should be taken in the investigatory phase to protect the Complainant from further harassment or retaliation including, but not limited to, a change of work assignment or schedule for the Complainant and/or the Respondent. In making such a determination, the Compliance Officer should consult the Complainant to assess whether the individual agrees with the proposed action. If the Complainant is unwilling to consent to the proposed change, the Compliance Officer may still take whatever actions deemed appropriate in consultation with the Superintendent.

Within two (2) business days of receiving the complaint, the Compliance Officer/designee will initiate a formal investigation to determine whether the Complainant has been subjected to offensive conduct/harassment/retaliation. The Principal will not conduct an investigation unless directed to do so by the Compliance Officer.

Simultaneously, the Compliance Officer will inform the Respondent that a formal complaint has been received. The Respondent will be informed about the nature of the allegations and provided with a copy of any relevant policies and/or administrative guidelines, including the Board's Anti-Harassment policy. The Respondent must also be informed of the opportunity to submit a written response to the formal complaint within five (5) days.

Although certain cases may require additional time, the Compliance Officer/designee will attempt to complete an investigation into the allegations of harassment/retaliation within fifteen (15) business days of receiving the formal complaint. The investigation will include:

- A. interviews with the Complainant;
- B. interviews with the Respondent;
- C. interviews with any other witnesses who may reasonably be expected to have any information relevant to the allegations;
- D. consideration of any documentation or other information presented by the Complainant, Respondent, or any other witness that is reasonably believed to be relevant to the allegations.

At the conclusion of the investigation, the Compliance Officer/designee shall prepare and deliver a written report to the Superintendent that summarizes the evidence gathered during the investigation and provides recommendations based on the evidence and the definition of unlawful harassment as provided in Board policy and State and Federal law as to whether the Respondent engaged in unlawful harassment/retaliation of the Complainant. The Compliance Officer's recommendations must be based upon the totality of the circumstances. In determining if discriminatory harassment or retaliation occurred, a preponderance of evidence standard will be used. The Compliance Officer may consult with the Board's legal counsel before finalizing the report to the Superintendent.

Absent extenuating circumstances, within five (5) business days of receiving the report of the Compliance Officer/designee, the Superintendent must either issue a final decision regarding whether the complaint of harassment has been substantiated or request further investigation. A copy of the Superintendent's written decision will be delivered to both the Complainant and the Respondent.

If the Superintendent requests additional investigation, the Superintendent must specify the additional information that is to be gathered, and such additional investigation must be completed within five (5) business days. At the conclusion of the additional investigation, the Superintendent must issue a written decision as described above.

The decision of the Superintendent shall be final.

**{OR}**

A Complainant or Respondent who is dissatisfied with the final decision of the Superintendent may appeal through a signed written statement to the Board within five (5) business days of the party's receipt of the Superintendent's decision.

In an attempt to resolve the complaint, the Board shall meet with the concerned parties and their representative within twenty (20) business days of the receipt of such an appeal. A copy of the Board's disposition of the appeal shall be sent to each party within ten (10) business days of this meeting. The decision of the Board will be final.

**{END OF OPTIONS}**

The Board reserves the right to investigate and resolve a complaint or report of unlawful harassment/retaliation regardless of whether the member of the School District community or Third Party alleging the unlawful harassment/retaliation pursues the complaint. The Board also reserves the right to have the formal complaint investigation conducted by an external person in accordance with this policy or in such other manner as deemed appropriate by the Board or its designee.

~~[ ] The parties may be represented, at their own cost, at any of the above described meetings/hearings.~~

~~The right of a person to a prompt and equitable resolution of the complaint shall not be impaired by the person's pursuit of other remedies such as the filing of a complaint with the Office for Civil Rights, the filing of charges with local law enforcement, or the filing of a civil action in court. Use of this internal complaint process is not a prerequisite to the pursuit of other remedies.~~

### **Privacy/Confidentiality**

~~The District will employ all reasonable efforts to protect the rights of the Complainant, the Respondent, and the witnesses as much as possible, consistent with the Board's legal obligations to investigate, take appropriate action, and conform with any discovery or disclosure obligations. All records generated under the terms of this policy and related administrative guidelines shall be maintained as confidential to the extent permitted by law. Confidentiality, however, cannot be guaranteed. Additionally, the Respondent must be provided with the Complainant's identity.~~

~~During the course of a formal investigation, the Compliance Officer/designee will instruct all members of the School District community and Third Parties who are interviewed about the importance of maintaining confidentiality. Any individual who is interviewed as part of a harassment investigation is expected not to disclose any information that is learned or provided during the course of the investigation.~~

### **Sanctions and Monitoring**

~~The Board shall vigorously enforce its prohibitions against unlawful harassment/retaliation by taking appropriate action reasonably calculated to stop the harassment and prevent further such harassment. While observing the principles of due process, a violation of this policy may result in disciplinary action up to and including the discharge of an employee or the suspension/expulsion of a student. All disciplinary action will be taken in accordance with applicable State law and the terms of the relevant collective bargaining agreement(s). When imposing discipline, the Superintendent shall consider the totality of the circumstances involved in the matter, including the ages and maturity levels of those involved. In those cases where unlawful harassment is not substantiated, the Board may consider whether the alleged conduct nevertheless warrants discipline in accordance with other Board policies, consistent with the terms of the relevant collective bargaining agreement(s).~~

~~Where the Board becomes aware that a prior remedial action has been taken against a member of the School District community, all subsequent sanctions imposed by the Board and/or Superintendent shall be reasonably calculated to end such conduct, prevent its recurrence, and remedy its effects.~~

### **Retaliation**

~~Retaliation against a person who makes a report or files a complaint alleging unlawful harassment/retaliation or participates as a witness in an investigation is prohibited. Neither the Board nor any other person may intimidate, threaten, coerce, or interfere with any individual because the person opposed any act or practice made unlawful by any Federal or State civil rights law, or because that individual made a report or formal complaint, testified, assisted, or participated or refused to participate in any manner in an investigation, proceeding, or hearing under those laws and/or the policy, or because that individual exercised, enjoyed, aided or encouraged any other person in the exercise or enjoyment of any right granted or protected by those laws and/or this policy.~~

~~Retaliation against a person for making a report of discrimination, filing a formal complaint, or participating in an investigation or meeting is a serious violation of this policy that can result in the imposition of disciplinary sanctions/consequences and/or other appropriate remedies.~~

~~Formal complaints alleging retaliation may be filed according to the internal complaint process set forth above.~~

~~The exercise of rights protected under the First Amendment of the United States Constitution does not constitute retaliation prohibited under this policy.~~

### **Allegations Constituting Criminal Conduct: Child Abuse/Sexual Misconduct**

~~State law requires any school teacher or school employee who knows or suspects that a child under the age of eighteen (18) or that a person with a disability receiving services as a student from the school regardless of age has suffered or faces a threat of suffering a physical or mental wound, disability or condition of a nature that reasonably indicates abuse or neglect of a child to immediately report that knowledge or suspicion to the county children's services agency. If, during the course of a harassment investigation, the Compliance Officer or a designee has reason to believe or suspect that the alleged conduct reasonably indicates abuse or neglect of the Complainant, a report of such knowledge must be made in accordance with State law and Board Policy.~~

~~Any reports made to a county children's services agency or to local law enforcement shall not terminate the Compliance Officer's or a designee's obligation and responsibility to continue to investigate a complaint of harassment. While the Compliance Officer or a designee may work cooperatively with outside agencies to conduct concurrent investigations, in no event shall the harassment investigation be inhibited by the involvement of outside agencies without good cause after consultation with the Superintendent.~~

## Education and Training

In support of this Anti Harassment Policy, the Board promotes preventative educational measures to create greater awareness of unlawful discriminatory practices. The Superintendent shall provide appropriate information to all members of the School District community related to the implementation of this policy and shall provide training for District students and staff where appropriate. All training, as well as all information provided regarding the Board's policy and harassment in general, will be age and content appropriate.

## Retention of Investigatory Records and Materials

The Compliance Officer(s) is responsible for overseeing the retention of all records that must be maintained pursuant to this policy. All individuals charged with conducting investigations under this policy shall retain all documents, electronically stored information (ESI), and electronic media (as defined in Policy 8315) created and/or received as part of an investigation which may include, but not be limited to:

- A. all written reports/allegations/complaints/grievances/ statements/responses pertaining to an alleged violation of this policy;
- B. any narratives that memorialize oral reports/allegations/ complaints/grievances/statements/responses pertaining to an alleged violation of this policy;
- C. any documentation that memorializes the actions taken by District personnel or individuals contracted or appointed by the Board to fulfill its responsibilities related to the investigation and/or the District's response to the alleged violation of this policy;
- D. written witness statements;
- E. narratives, notes from, or audio, video, or digital recordings of witness interviews/statements;
- F. e-mails, texts, or social media posts that directly relate to or constitute evidence pertaining to an alleged violation of this policy (i.e., not after the fact commentary about or media coverage of the incident);
- G. notes or summaries prepared contemporaneously by the investigator in whatever form made (e.g., handwritten, keyed into a computer or tablet, etc.), but not including transitory notes whose content is otherwise memorialized in other documents;
- H. written disciplinary sanctions issued to students or employees and other documentation that memorializes oral disciplinary sanctions issued to students or employees for violations of this policy;
- I. dated written determinations/reports (including summaries of relevant exculpatory and inculpatory evidence) and other documentation that memorializes oral notifications to the parties concerning the outcome of the investigation, including any consequences imposed as a result of a violation of this policy;
- J. documentation of any supportive measures offered and/or provided to the Complainant and/or the Respondent, including no contact orders issued to both parties, the dates the no contact orders were issued, and the dates the parties acknowledged receipt of the no contact orders;
- K. documentation of all actions taken, both individual and systemic, to stop the discrimination or harassment, prevent its recurrence, eliminate any hostile environment, and remedy its discriminatory effects;
- L. copies of the Board policy and/or procedures/guidelines used by the District to conduct the investigation, and any documents used by the District at the time of the alleged violation to communicate the Board's expectations to students and staff with respect to the subject of this policy (e.g., Student Code of Conduct and/or Employee Handbooks);
- M. copies of any documentation that memorializes any formal or informal resolutions to the alleged discrimination or harassment;

**[DRAFTING NOTE: The following options should be selected if the district concludes that the following items are not adequately encompassed in the preceding paragraphs.]**

- N. ( ) documentation of any training provided to District personnel related to this policy including, but not limited to, notification of the prohibitions and expectations of staff set forth in this policy and the role and responsibility of all District personnel involved in enforcing this policy, including their duty to report alleged violations of this policy and/or conducting an investigation of an alleged violation of this policy; **[REMINDER: Documentation of training should be maintained regardless of whether there is an investigation of an alleged violation of this policy. It is best practice to maintain a log of all staff members who participate in a training, along with the date, time and location of the training, and a copy of the materials reviewed and/or presented during the training.]**
- O. ( ) documentation that any rights or opportunities that the District made available to one party during the investigation were made available to the other party on equal terms;

~~P. ( ) copies of any notices sent to the alleged perpetrator/responding party of the allegations constituting a potential violation of this policy;~~

~~Q. ( ) copies of any notices sent to the Complainant and the Respondent in advance of any interview, meeting, or hearing;~~

~~R. ( ) copies of any documentation or evidence used during informal and formal disciplinary meetings and hearings, including the investigation report, and any written responses submitted by the Complainant or the Respondent.~~

~~The documents, ESI, and electronic media (as defined in Policy 8315) retained may include public records and records exempt from disclosure under Federal (e.g., FERPA, ADA) and/or State law — e.g., student records and confidential medical records.~~

~~The documents, ESI, and electronic media (as defined in Policy 8315) created or received as part of an investigation shall be retained in accordance with Policy 8310, Policy 8315, Policy 8320, and Policy 8330 for not less than three (3) years, but longer if required by the District's records retention schedule.~~

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Legal

20 U.S.C. 1400 et seq., The Individuals with Disabilities Education Improvement Act of 2004 (IDEIA)

29 C.F.R. Part 1635

29 U.S.C. 621 et seq., Age Discrimination in Employment Act of 1967

29 U.S.C. 794, Rehabilitation Act of 1973, as amended

42 U.S.C. 1983

42 U.S.C. 2000e et seq.

42 U.S.C. 2000ff et seq., The Genetic Information Nondiscrimination Act

42 U.S.C. 6101, The Age Discrimination Act of 1975

42 U.S.C. 12101 et seq., Americans with Disabilities Act of 1990, as amended

Titles VI and VII of the Civil Rights Act of 1964, 42 U.S.C. 2000d et seq.

Title IX of the Educational Amendments of 1972, 20 U.S.C. 1681 et seq.

The Handicappers Civil Rights Act, M.C.L. 37.1101 et seq.

The Elliott-Larsen Civil Rights Act, M.C.L. 37.2101, et seq.

Policies on Bullying, Michigan State Board of Education, 7-19-01

Model Anti-Bullying Policy, Michigan State Board of Education, 09-2006

National School Boards Association Inquiry and Analysis May 2008

**Last Modified by Wayne Wright on October 20, 2025**



Book	Policy Manual
Section	For the Board 40-1
Title	Copy of COMMITTEES
Code	po0155
Status	1st Reading
Adopted	September 13, 2012
Last Revised	October 10, 2024
Last Reviewed	March 13, 2026

#### 0155 - **COMMITTEES**

Committees of Board members shall perform the duties as assigned by the Board, which may include deliberating, making decisions/recommendations or taking other actions specifically authorized by the Board.

All committees shall comply with the Open Meetings Act in accordance with the applicable requirements set forth in Bylaw 0160. A committee may meet in closed session to review the specific contents of an employment application provided when the applicant for employment requests that the information remains confidential. It may not, however, meet in closed session to protect an applicant's identity.

- A. The President is authorized to appoint, in ~~August~~ **January**, for each school year (~~September~~ **February** to following ~~August~~ **January**) members of the Board to the standing committees where they shall serve a term of one (1) year. Committee appointments may be made during the year, as needed. **A schedule will be released in coordination with the Superintendent.**
- B. Ad hoc committees may be created and changed at any time by the President or a majority vote of the Board of Education, no more than one (1) per semester. The Trustee who proposes an ad hoc committee, if approved by the Board of Education, shall be appointed to serve on the said committee.
- C. Members of ad hoc committees shall serve until the committee is discharged, no longer than two (2) full semesters.
- D. The Superintendent or designee shall serve as an ex-officio member of each committee.
- E. Each Board committee shall be convened by a chairperson who shall report for the committee.

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**Last Modified by Jennifer Perkins on March 17, 2026**

Book	Policy Manual
Section	For the Board 40-1
Title	Copy of CONTROVERSIAL ISSUES
Code	po2240
Status	1st Reading
Adopted	September 13, 2012
Last Reviewed	March 13, 2026

#### 2240 - ~~CONTROVERSIAL~~ **CONTENTIOUS** ISSUES

The Board of Education believes that the consideration of ~~controversial~~ **contentious** issues has a legitimate place in the instructional program of the schools.

Properly introduced and conducted, the consideration of such issues can help students learn to identify important issues, explore fully and fairly all sides of an issue, weigh carefully the values and factors involved, and develop techniques for formulating and evaluating positions. In the discussion of any issue, a teacher may express a personal opinion, but shall identify it as such, and must not express such an opinion for the purpose of persuading students to ~~his/her~~ **their** point of view.

For purposes of this policy, a ~~controversial~~ **contentious** issue is a topic on which opposing points of view have been promulgated by responsible opinion and likely to arouse both support and opposition in the community.

The Board will permit the introduction and proper educational use of ~~controversial~~ **contentious** issues provided that their use in the instructional program:

A. is related to the instructional goals of the course of study and level of maturity of the students;

B. ~~does not tend to indoctrinate or persuade students to a particular point of view;~~

C. **B.** encourages open-mindedness and is conducted in a spirit of scholarly inquiry.

When ~~controversial~~ **contentious** issues have not been specified in the course of study, the Board will permit the instructional use of only those issues which have been approved by the Principal or Superintendent.

The Board recognizes that a course of study or certain instructional materials may contain content or activities that some parents find objectionable. If after careful, personal review of the program lessons and materials, a parent indicates to the school that either content or activities conflicts with ~~his/her~~ **their** religious beliefs or value system, the school may honor a written request for ~~his/her~~ **their** child to be excused from particular classes for specified reasons. The student may be required to substitute the missing lessons or classes with alternative learning activities. The student must fulfill graduation requirements in order to graduate from Royal Oak High School.

**Last Modified by Jennifer Perkins on March 17, 2026**

Book	Policy Manual
Section	For the Board 40-1
Title	Copy of FIELD AND OTHER DISTRICT-SPONSORED TRIPS
Code	po2340
Status	1st Reading
Adopted	September 13, 2012
Last Revised	July 10, 2025
Last Reviewed	March 13, 2026

## 2340 - **FIELD AND OTHER DISTRICT-SPONSORED TRIPS**

The Board of Education recognizes the value of organized trips or other excursions away from the classroom as a valuable part of the District's educational programming and a valuable opportunity to obtain additional educational experiences not offered directly in the curriculum offerings. These opportunities occur in four (4) primary forms addressed in this policy: (a) field trips; (b) extra-curricular/co-curricular program-related trips; (c) overnight trips; and (d) other District-sponsored trips.

### **Field Trips**

For purposes of this policy, a field trip shall be defined as any planned journey by one (1) or more students away from District premises, which is under the supervision of a professional staff member, approved by the Superintendent or designee and furthers or supplements an integral part of a course of study as planned for and incorporated into that course of study by the teacher.

The Board shall approve those field trips that are planned to keep students out of the State.

Properly planned and executed field trips should cultivate new interests among students, help students relate school experience to the reality of the world outside of school, bring the resources of the community within the students' learning experience, and afford students the opportunity to study real things and processes in their actual environment.

### **Extra-Curricular/Co-Curricular Trips**

The Board recognizes that student trips will occur for reasons that are not directly incorporated into the curriculum as part of a class, but rather are part of the extra-curricular/co-curricular activities offered by the District. For example, a District athletic team may travel to away games or take a trip to an out-of-town tournament. Any such trips must be identified at the beginning of the activity for the school year or for the particular season. Extra-curricular or co-curricular trips shall be approved by the Administration Athletic Director in accordance with the same procedures used for approving field trips. In cases where such advance notice is not possible (such as travel to a State tournament competition), the staff member responsible for such activity shall notify the Athletic Director, Principal Superintendent of the activity, and provide pertinent information.

Extra-curricular trips that extend to an overnight stay are considered overnight travel, other than MHSAA athletic teams participating in State tournaments/meets.

### **Overnight Travel**

Overnight travel is defined as a field trip that involves one (1) or more overnight stays. The District views overnight travel outside of the District related to the curriculum/program as an adjunct to that curriculum/program. As such, it is an important feature of the overall educational program. The District recognizes the importance of overnight travel outside of the District to amplify and enhance studies that occur in the schools' classrooms through unique enrichment opportunities that are not available locally. Overnight travel shall first be approved by the Principal Superintendent in accordance with the District's overnight travel guidelines.

International field trips present special considerations that need to be taken into account when planning these activities. The Board must approve these trips to be considered District-sponsored trips. The Board will only approve international field trips that are affiliated with a sponsoring or commercial organization that specializes in international travel and that is responsible for establishing

the cost of such programs and for collecting payment directly from participating students or their parents.

Approval of international travel shall also take into account travel warnings for Americans to avoid travel to specified countries. These warnings are issued by the United States Department of State based on current conditions around the world and are updated as deemed necessary.

### **Other District-Sponsored Trips**

Other District-sponsored trips shall be defined as any planned, student-travel activity which is approved as part of the District's total educational program, but not a part of a particular course and not expressly connected to an established extra-curricular/co-curricular activity. These trips may include such trips as summer trip programs, youth service trips, and other types of day trips that are organized by or through school staff or facilitated in some fashion through the District.

### **Trip Approval Process**

No staff member may offer or lead any trip as a District-sponsored trip unless the trip has been approved in the manner prescribed in this policy.

Proposals shall include the details of the trip, the cost of the trip, identify any third-party entities that will be involved in the trip, identify the curriculum-based purpose of the trip, identify what students will be eligible to participate, and any other pertinent information. If overnight, the proposal must describe how accommodations will be provided and how such arrangements will be properly supervised.

The Board shall approve those field trips that are planned to keep students out of the State.

### **General Trip Provisions**

Students on all District-sponsored trips remain under the supervision of this Board and are subject to the District's administrative guidelines.

The Board does not endorse, support, or assume liability in any way for any staff member, volunteer, or parent of the District who takes students on trips not approved by the Board, ~~or Superintendent,~~ or designee. No staff member may solicit students of this District for such trips within the facilities or on the school grounds of the District without permission from the Superintendent or designee. Permission to solicit neither grants nor implies approval of the trip.

The Superintendent shall prepare administrative guidelines for the operation of both field and other District-sponsored trips, including athletic trips, which shall ensure:

- A. the safety and well-being of students;
- B. parental permission is sought and obtained before any student leaves the District on a trip;
- C. each trip is properly planned, and if a field trip, is integrated with the curriculum, evaluated, and followed up by appropriate activities which enhance its usefulness;
- D. the effectiveness of field trip activities is judged in terms of demonstrated learning outcomes;
- E. each trip is properly monitored (see administrative guideline for specific ratios);
- F. student behavior while on all field trips complies with the Student Code of Conduct, and on all other trips complies with an approved code of conduct for the trip;
- G. the staff member in charge shall have access to each student's Emergency Medical Authorization Form;
- H. provisions have been made for the administration of medication to those students for whom medications are administered routinely while at school;
- I. provisions have been made at the trip destination and in transportation, if and when required to accommodate students and/or chaperones with disabilities;

A professional staff member shall not change a planned itinerary while the trip is in progress, except where the health, safety, or welfare of the students in the staff member's charge is imperiled or where changes or substitutions beyond the staff member's control have frustrated the purpose of the trip.

In any instance in which the itinerary of a trip is altered, the professional staff member in charge shall notify the administrative superior immediately.

### **Trips Not Sponsored by the District**

No staff member, volunteer, coach, or other individual acting in some capacity for the District may solicit students of this District to participate in any trip not sponsored by the District unless that staff member has received approval from the Principal Superintendent to promote such trips within the facilities or on the school grounds. This includes summer trips abroad or other trips offered through a third-party organizer in which a staff member, volunteer, coach, or other individual acting in some capacity for the District is participating, as well as athletic activities outside the District's athletic program.

If approval is granted to solicit students to participate, that individual must clearly communicate to parents that the trip is not District-sponsored and that the individual is not participating within the staff member's role representing the District. Coordination and/or participation in such a program shall be consistent with Policy 3210 - Staff Ethics/Policy 4210 - Support Staff Ethics.

### **Transportation for Field and Other District-Sponsored Trips**

Regular or special-purpose school vehicles will be used for transportation on field and other District-sponsored trips.

The transportation for all field and other District-sponsored trips is to be by vehicles owned or approved by the District and driven by approved drivers. Exceptions must have the approval of the Superintendent.

Transportation may be limited by the availability of vehicles, drivers, and scheduling, and will not be available when needed for general school purposes.

All students are expected to ride the approved vehicle to and from each activity. A special request must be made to the staff member or sponsor by the parent, in writing or in person, to allow an exception.

District students not affiliated with the trip activity, nondistrict students, and/or children of preschool age shall not be permitted to ride on the trip vehicle without the approval of the Principal.

No student is allowed to drive on any trip. An exception may be made by the Principal on an individual basis, provided the student has written parental permission and does not transport any other student.

The Superintendent shall prepare administrative guidelines to ensure that all transportation is in compliance with Board policy on the use of District vehicles and/or private vehicles.

Revised 6/23/22

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Legal

M.C.L. 380.1282

**Last Modified by Jennifer Perkins on March 20, 2026**

Book	Policy Manual
Section	For the Board 40-1
Title	Vol. 40, No. 1 - September 2025 Revised CONTROLLED SUBSTANCE AND ALCOHOL POLICY FOR COMMERCIAL MOTOR VEHICLE ("CMV") DRIVERS AND OTHER EMPLOYEES WHO PERFORM SAFETY-SENSITIVE FUNCTIONS
Code	po4162
Status	1st Reading
Last Reviewed	March 13, 2026

### **Revised Policy - Vol. 40, No. 1**

#### **4162 - CONTROLLED SUBSTANCE AND ALCOHOL POLICY FOR COMMERCIAL MOTOR VEHICLE ("CMV") DRIVERS AND OTHER EMPLOYEES WHO PERFORM SAFETY-SENSITIVE FUNCTIONS**

##### **Purpose**

The Board of Education believes that the safety of students while being transported to and from school or school activities is of utmost importance and is the primary responsibility of the driver of the school vehicle. To fulfill such a responsibility, each driver, as well as others who perform safety-sensitive functions with District vehicles (collectively "Covered Employees"), must be mentally and physically alert at all times while on duty.

To that end, the Board has established this policy, which includes an alcohol and controlled substances testing program. The Board also expects all Covered Employees to comply with Board Policy 4122.01 on Drug-Free Workplace, which prohibits the possession, use, sale, or distribution of alcohol and any controlled substance on school property at all times.

Further, the Board concurs with the Federal requirement that all Covered Employees should be free of any influence of alcohol or controlled substance while on duty. Therefore, participation in the alcohol and controlled substances testing program is a condition of employment for all Covered Employees.

##### **Definitions**

For purposes of this policy and the guidelines associated with the policy, the following definitions shall apply.

- A. The term *alcohol* means the intoxicating agent in beverage alcohol, ethyl alcohol, or other low molecular weight alcohols, including methyl or isopropyl alcohol.
- B. The term *illegal drug* means drugs and controlled substances, the possession or use of which is unlawful, pursuant to Federal, State, and/or local laws and regulations.
- C. The term *controlled substance* includes any illegal drug and any drug that is being used illegally, such as a prescription drug that was not legally obtained or not used for its intended purposes or in its prescribed quantity. The term does not include any legally-obtained prescription drug used for its intended purpose in its prescribed quantity unless such use would impair the individual's ability to safely perform safety-sensitive functions.
- D. The term *controlled substance abuse* includes excessive use of alcohol as well as prescribed drugs not being used for prescribed purposes, in a prescribed manner, or in the prescribed quantity.
- E. The term *safety-sensitive functions* includes all tasks associated with the operation and maintenance of District-owned and/or operated vehicles. This term further includes any period in which an individual is actually performing, ready to perform, or immediately available to perform any safety-sensitive function.
- F. The term *Covered Employee* means all commercial driver license ("CDL") holders and regular and substitute bus drivers, as well as other staff who operate, inspect, service, and condition a commercial motor vehicle ("CMV") while on duty, regardless of whether they are required to hold a CDL.

~~( ) This policy also covers other staff members who drive students in or inspect, service, and condition non-CMV District vehicles.~~

G. The term *while on duty* means all time from the time the Covered Employee begins to work or is required to be in readiness for work until the time the Covered Employee is relieved from work and all responsibility for performing work.

## Procedures

The Superintendent shall establish a drug and alcohol testing program whereby each Covered Employee is tested for the presence of alcohol in their system as well as for the presence of the following controlled substances:

- A. Marijuana
- B. Cocaine
- C. Opioid
- D. Amphetamines
- E. Phencyclidine (PCP)

The alcohol and controlled substances tests are to be conducted in accordance with Federal and State regulations a.) prior to employment (**Controlled Substances Only**), b.) reasonable suspicion, c.) upon return to duty after any alcohol or drug rehabilitation,

### [OPTION 1]

d.) post-accident 1) resulting in human death, 2) where the driver is issued a citation and the accident results in an injury that requires immediate medical attention away from the scene, or 3) where there is disability damage to any motor vehicle that requires towing,

### [END OF OPTION 1]

### ~~[ ] [OPTION 2]~~

~~d.) post-accident,~~

### ~~[END OF OPTION 2]~~

**[DRAFTING NOTE: must select one (1) option. OPTION 1 mirrors the DOT regulations; OPTION 2 provides a more affirmative approach to drivers who are primarily involved with transporting children.]**

### [END OF OPTIONS]

e.) on a random basis, and f.) on a follow-up basis.

Candidates shall also be tested for the presence of alcohol in their system prior to employment. **[END OF OPTION]**

The Superintendent shall require that the District query the FMCSA's Drug and Alcohol Clearinghouse for current and prospective CDL drivers' drug and alcohol violations before allowing a driver to operate a District-owned and/or operated vehicle, consistent with Federal regulations, including consent requirements.

Any staff member who tests positive as defined in the guidelines shall be immediately prohibited from driving any District-owned and/or operated vehicle or conducting a safety-sensitive function:

- A.  and evaluated by a substance abuse professional;
- B.  and provided information regarding drug/alcohol counseling, or referred to the District's Employee Assistance Program;
- C.  and subject to discipline, up to and including discharge, in accordance with District guidelines and the terms of any applicable collective bargaining agreements.

No staff member who has tested positive for alcohol or a controlled substance may be returned to a safety-sensitive position without having been evaluated by a qualified substance abuse professional ("SAP"), completing any required treatment program, and passing a retest. Return to a safety-sensitive position is solely at the District's discretion, and the employee may be required to participate in ongoing services if recommended by the SAP. Any staff member who has tested positive for alcohol or a controlled substance will be provided with a list of SAPs available and acceptable to the District.

Furthermore, if during any test the lab determines that an adulterant has been added to the specimen, then

( x ) the test will be considered positive and the employee shall be prohibited from performing any safety-sensitive functions and be referred to the District's Employee Assistance Program.

~~( ) the employee will be re-tested with an observed collection to prevent the addition of an adulterant to the specimen. [END OF OPTIONS]~~

Any staff member who refuses to submit to a test shall immediately be prohibited from performing or continuing to perform his/her safety-sensitive functions (e.g., driving any Board-owned vehicle).

Prior to the beginning of the testing program, the District shall provide a drug-free awareness program which will inform Covered Employees and their supervisors about:

- A. the dangers of illegal drug use and controlled substance and alcohol abuse;
- B. indicators of probable alcohol misuse and controlled substance abuse;
- C. Board Policy 4122.01 - Drug-Free Workplace, Policy 4161 - Unrequested Leaves of Absence/Fitness for Duty, Policy 4170 - Substance Abuse, and Policy 4170.01 - Employee Assistance Program;
- D. the sanctions that may be imposed for violations of Policy 4122.01.

All time spent undergoing an alcohol or controlled substance test, including travel time, will be paid at the staff member's regular rate of pay or overtime rate, if applicable. Any staff member who is not allowed to return to work while awaiting test results will be compensated during the waiting period for all work time lost, including overtime, if applicable. The Board shall pay all costs associated with the administration of alcohol and controlled substance tests. This includes testing of the "split specimen" at a Federally certified laboratory if so requested by a staff member. Requests for a "split specimen" must be made within seventy-two (72) hours of receipt of the notification of a positive drug test. The Board will not pay for the employee's time while not on duty if the split specimen test results are positive.

Alcohol and drug test results shall be protected as confidential medical records as appropriate under Federal law (i.e. test results shall be provided on a right-to-know basis - the employee, the employer, and the substance abuse professional - and the results shall not be presented until analyzed by a Medical Review Officer).

A tested individual, upon written request, will be promptly provided copies of any records relating to the individual's use of drugs and alcohol, including any records pertaining to the individual's drug and alcohol tests. A tested individual must provide specific written consent before the individual's test result can be provided to any other person except as required by law.

All tests shall be conducted in accordance with Federal testing guidelines and be performed by a laboratory that is Federally certified.

The alcohol and drug testing program shall be under the direction of the Superintendent.

The Superintendent shall arrange for periodic retraining of supervisors and staff members as necessary. The Superintendent shall provide a copy of this policy and testing guidelines to all Covered Employees and will include available resources to assist employees with problems related to the use of alcohol and controlled substances.

The Superintendent shall submit, for Board approval, a contract with a certified laboratory to provide the following services:

- A. testing of all first and second test urine samples
- B. clear and consistent communication with the District's Medical Review Officer ("MRO")
- C. methodology and procedures for conducting random tests for controlled substances and alcohol
- D. preparation and submission of all required reports to the District, the MRO, and to Federal and State governments

The Superintendent shall also select the agency or persons who will conduct the alcohol breathalyzer tests, the District's MRO, and the drug collection site(s) in accordance with the requirements of the law.

#### **Notification**

A tested candidate shall be notified of the results of a pre-employment controlled substances test conducted under this part if the driver requests such results within sixty (60) calendar days of being notified of the disposition of the employment application.

A tested individual shall be notified of the results of random, reasonable suspicion, and post-accident tests for controlled substances conducted under this policy if the test results are verified positive. The tested individual shall also be informed which controlled substance or substances were verified as positive.

The Superintendent shall make reasonable efforts to contact and request each driver who submitted a specimen under the employer's program, regardless of the driver's employment status, to contact and discuss the results of the controlled substances test with a medical review officer who has been unable to contact the driver.

The Superintendent shall immediately notify the medical review officer that the driver has been notified to contact the medical review officer within seventy-two (72) hours.

Individuals holding a CDL license must notify all current employers of any DOT violations (such as testing positive for the presence of alcohol or a controlled substance in violation of this policy). The notification must be made 1) by the end of the business day following the day the individual first receives notice of the violation or 2) prior to performing any safety-sensitive function, whichever comes first. Individuals are not required to notify the employer that administered the test or that documented the circumstances giving rise to the violation.

In the event that an individual is selected for testing, the Superintendent will inform the individual that the test is required by applicable law.

### **Reporting Test Results**

The Superintendent shall report all information required by Federal regulations to the Clearinghouse in a timely manner. The Superintendent shall prepare and maintain a summary of the results of its alcohol and controlled substances testing programs performed under this policy during the previous calendar year when requested by the Secretary of Transportation, any DOT agency, or any State or local officials with regulatory authority over the employer or any of its drivers. Such summaries shall be submitted in a manner and timeline as required by law.

### **Educational Materials Related to Certain Federal Regulations, Board Policies, and Procedures**

CDL License Holders and other employees who perform safety-sensitive functions will be provided educational materials at the time of hire or at any time when required to operate a school vehicle. The educational materials shall explain the requirements of applicable Federal regulations and the Board's policies and the District's procedures with respect to meeting these Federal regulations. The Board designates ~~the~~ **Durham School Services** \_\_\_\_\_ as the individual responsible for providing educational materials to CDL License Holders and other employees who perform safety-sensitive functions. The educational materials will include, at a minimum, the following:

- A. the contact information for ~~the~~ **Durham School Services** \_\_\_\_\_, who is the individual designated by the Board to answer questions about the educational materials;
- B. a statement that all CDL License Holders and other employees who perform safety-sensitive functions are subject to Federal law addressing the misuse of alcohol and other controlled substances;
- C. information sufficient to make clear to employees the period of the work day during which they are required to comply with the regulations;
- D. information concerning prohibited conduct;
- E. the circumstances under which employees are subject to testing for alcohol and/or controlled substances;
- F. the procedures for testing for the presence of alcohol and controlled substances in order to protect the employee and the integrity of the testing process, safeguard the validity of the test results, and confirm the results are attributed to the correct employee, including post-accident information, procedures, and instructions required under Federal regulations;
- G. the requirement that staff members must submit to alcohol and controlled substance testing as required by the regulations;
- H. an explanation of what constitutes a refusal to be tested for alcohol or controlled substances and the attendant consequences;
- I. the consequences of testing positive, including the requirements of immediate removal from safety-sensitive functions, and the procedures regarding referral, evaluation, and treatment;
- J. the consequences for employees found to have an alcohol concentration of 0.02 or greater but less than 0.04;
- K. information concerning the effects of alcohol and controlled substances use on an individual's health, work, and personal life; signs and symptoms of an alcohol and/or controlled substances problem (the employee's or a co-worker's); and available methods of intervening when controlled substances and/or alcohol problem is suspected (including confrontation and how to refer someone to an Employee Assistance Program or to management);
- L. information regarding the requirement that certain personal information collected and maintained under Federal law be reported to the Commercial Driver's License Drug and Alcohol Clearinghouse; and
- M. information indicating that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance, including alcohol, is prohibited on all School Board property and at school-sponsored activities. Individuals are strictly

prohibited from reporting to work or being on duty while under the influence of alcohol or a controlled substance.

These materials are to be distributed to each staff member upon being hired or transferred into a covered position thereafter. Each staff member must sign a statement certifying receipt of these materials. A staff member who refuses to sign the requisite statement shall be prohibited from performing any safety-sensitive functions. Each employee (and the labor organization representing Board employees) shall receive written notice of the availability of this information, and the identity of the Board's designated representative in charge of answering employee questions about the materials.

### **Return-to-Duty (Safety-Sensitive Positions)**

Employees who are removed from performing safety-sensitive functions as a result of this policy must complete the Return-to-Duty ("RTD") process as required by the U.S. Department of Transportation ("DOT") regulations and their Federal Motor Carrier Safety Act ("FMCSA") Drug and Alcohol Clearinghouse status must be changed from "prohibited" to "not prohibited" before resuming safety-sensitive duties. The RTD process requires an evaluation by a qualified Substance Abuse Professional ("SAP"), successful compliance with the SAP's prescribed education and/or treatment program, and a follow-up evaluation by the SAP determining that the employee has complied with the program. The employee must then complete a DOT return-to-duty test and obtain a verified negative drug test result and/or an alcohol test result of less than 0.02 before being permitted to return to the performance of safety-sensitive functions.

In addition, employees must comply with the SAP's written follow-up testing plan, which will be administered by the District in accordance with DOT regulations. An employee who fails to comply with the follow-up testing plan will not be permitted to perform safety-sensitive duties.

Subject to any collective bargaining agreement or other legal requirements, employees who are otherwise eligible to resume safety-sensitive functions may not do so without the Superintendent's approval.

~~Employees who are removed from performing safety sensitive functions as a result of this policy must take and pass a return to duty test before returning to performing safety sensitive functions. The return to duty test will not occur until after a Substance Abuse Professional (SAP) has determined that the employee has successfully complied with prescribed education and/or treatment. The employee must have a negative drug test result and/or an alcohol test with an alcohol concentration of less than 0.02 before resuming performance of safety sensitive duties. The employee will not be permitted to perform safety sensitive functions until the start of the employee's next regularly scheduled duty period, but not less than twenty four (24) hours following administration of the return to duty test.~~

~~Employees must also comply with the SAP's written follow up testing plan, which will be administered by the District, or they will not be permitted to perform safety sensitive duties.~~

~~Subject to any collective bargaining agreement or other legal requirements, employees who are eligible to return to performing safety sensitive functions may not do so without the approval of the Superintendent.~~

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Legal                                    49 C.F.R. 382  
    49 C.F.R. Part 40

**Last Modified by Jennifer Perkins on March 17, 2026**





## Oakland Schools Board of Education 2026 Election Timeline

### **December 2025:**

Candidates may pick up nominating petitions and affidavit forms at the Oakland County Clerk's Office, Elections Division [1200 N. Telegraph Road, Dept. 417, Pontiac, MI 48341].

### **May 1, 2026 – 4:00 PM:**

Deadline for candidates to file nominating petitions, filing fees, and Affidavits of Identity with the Oakland County Clerk's Office, Elections Division.

### **May 4, 2026:**

Oakland Schools receives Official Candidate List from Oakland County Clerk's Office, Elections Division. Oakland Schools sends list of candidates to constituent district superintendents and executive assistants to the superintendents.

### **May 11 - 29, 2026:**

Each constituent district board of education must:

- 1) Designate its representative(s) and identify the ISD candidate(s) its board supports.
- 2) Consider and adopt a resolution affirming #1. Each board must consider its resolution at not less than one (1) public meeting before adopting the resolution.

### **May 29, 2026 – 4:00 PM:**

Copies of district resolutions due to the Oakland Schools Superintendent's office via fax (248.209.2206) or email (Nicole.Christian@oakland.k12.mi.us). **Please note that no approved resolutions shall be accepted after this time/date. If the resolution is not filed, the constituent district will be unable to cast a vote during the June 1 election.**

### **June 1, 2026 – 5:30-7:30 PM:**

District representatives attend Oakland Schools Board of Education Biennial Board Election open meeting to cast ballot(s) on behalf of their districts. ***No absentee ballots can be accepted.***

### **June 2, 2026:**

Notification of election results sent from Oakland Schools to constituent district superintendents, executive assistants to the superintendents, and the Oakland County Clerk's Office, Elections Division.

### **July 7, 2026:**

Successful candidates take *Oath of Office* at Oakland Schools Board of Education Organizational Meeting, *if not present at the Biennial Board Election.*

**THE REVISED SCHOOL CODE (EXCERPT)**  
**Act 451 of 1976**

**380.614 Board; election of members; resolution; notice of meeting; acting chairperson and secretary; open meeting; term; vacancy; nominating petition; signatures; filing petition and affidavit; ballots; filing fee.**

Sec. 614. (1) Except as provided in section 615 and subject to section 642c of the Michigan election law, MCL 168.642c, the members of the intermediate school board shall be elected biennially on the first Monday in June by an electoral body composed of 1 person designated by the board of each constituent school district.

(2) The board of a constituent district shall designate its representative to this electoral body by resolution adopted not earlier than 21 days before the date of this biennial election. The board shall consider the resolution at not less than 1 public meeting before adopting the resolution. The resolution shall be adopted by majority vote of the members serving on the board. In its resolution designating its representative, the board of a constituent district shall identify the candidate the board supports for each position to be filled on the intermediate school board and shall direct its representative to vote for that individual or individuals at least on the first ballot taken by the electoral body. The secretary of the intermediate school board shall send a notice by certified mail of the hour and place of the meeting of the electoral body described in subsection (1) to the secretary of the board of each constituent school district at least 10 days before the meeting. The president and secretary of the intermediate school board shall act as chairperson and secretary at the meeting. The meeting of the electoral body shall be an open meeting conducted in the manner prescribed under the open meetings act, 1976 PA 267, MCL 15.261 to 15.275.

(3) Except as provided in section 703, the term of office of each member elected to the intermediate school board is 6 years and begins on July 1 following election. Not more than 2 members of the intermediate school board shall be from the same school district unless there are fewer districts than there are positions to be filled.

(4) A vacancy shall be filled by the remaining members of the intermediate school board until the next biennial election at which time the vacancy shall be filled for the balance of the unexpired term. Notice of the vacancy shall be filed with the state board within 5 days after the vacancy occurs. If the vacancy is not filled within 30 days after it occurs, the vacancy shall be filled by the state board.

(5) Subject to subsection (7), a candidate for election to the intermediate school board shall be nominated by petitions that are signed by a number of school electors of the combined constituent school districts of the intermediate school district, as follows:

(a) If the population of the intermediate school district is less than 10,000 according to the most recent federal census, a minimum of 6 and a maximum of 20.

(b) If the population of the intermediate school district is 10,000 or more according to the most recent federal census, a minimum of 40 and a maximum of 100.

(6) A school elector may sign as many petitions as there are vacancies to fill. Nominating petitions and an affidavit as provided in section 558 of the Michigan election law, MCL 168.558, shall be filed with the school district filing official not later than 30 days before the date of the biennial election under subsection (1). The school district filing official shall determine the sufficiency of the petitions and the eligibility of the candidates nominated. The school district filing official shall provide ballots for the biennial election, listing on the ballots the names of all candidates properly nominated. The chairperson of the biennial election meeting may accept nominations for a vacancy from the floor only if no nominating petitions have been filed for the vacancy.

(7) Instead of filing nominating petitions, a candidate for election to the intermediate school board may pay a nonrefundable filing fee of \$100.00 to the school district filing official. If this fee is paid by the due date for nominating petitions, the payment has the same effect under this section as the filing of nominating petitions.

**History:** 1976, Act 451, Imd. Eff. Jan. 13, 1977;—Am. 1977, Act 43, Imd. Eff. June 29, 1977;—Am. 1981, Act 87, Imd. Eff. July 2, 1981;—Am. 1984, Act 322, Eff. Dec. 28, 1984;—Am. 1992, Act 263, Eff. Jan. 1, 1993;—Am. 2002, Act 157, Eff. Jan. 1, 2003;—Am. 2003, Act 299, Eff. Jan. 1, 2005;—Am. 2004, Act 233, Imd. Eff. July 21, 2004;—Am. 2004, Act 419, Imd. Eff. Nov. 29, 2004;—Am. 2011, Act 232, Eff. Jan. 1, 2012.

**Popular name:** Act 451

## OAKLAND INTERMEDIATE SCHOOL DISTRICT

**Election Date: June 1, 2026**  
**Vote for One**  
**Six Year Term Ending June 30, 2032**

### **Filing Official**

Oakland County Elections Division  
West Wing Extension, 1<sup>st</sup> Floor  
1200 N. Telegraph Rd., Dept. 417  
Pontiac, MI 48341-0417  
(248) 858-0563

### **Qualifications**

A candidate for any seat on the Oakland Schools Board of Education must be a registered voter at least 18 years of age, a citizen of the United States, and must reside within one of Oakland County's school districts. Additionally, a candidate must be a resident of the State of Michigan for at least 30 days; and a resident of one of the 28 constituent school districts on or before the 30th day prior to the date of the election. A candidate for the 2026 election may also be currently seated on a local school district board of education.

### **Nominating Petitions, Filing Fee and Affidavits of Identity**

**Friday, May 1, 2026, at 4:00 p.m. is the last day to file petitions with the County Clerk.** Petition and Affidavit of Identity forms are available at the Oakland County Elections Division, 1200 N. Telegraph Rd., Dept. 417, Pontiac 48341-0417.

A minimum of 40 and no more than 100 valid signatures is required for each candidate. Only qualified registered electors of the OAKLAND INTERMEDIATE SCHOOL DISTRICT may sign nominating petitions. Petitions must be circulated on a city/township basis. Electors may sign petitions for only as many candidates as there are persons to be elected to such office.

Those circulating petitions must be qualified registered electors in the State of Michigan. The circulator must sign each petition page – care must be taken to date the petition form **AFTER** it has been circulated. The County Clerk is responsible for determining the sufficiency of any petitions filed by OISD candidates and the eligibility of the candidates to seek a position on the OISD board.

A \$100 nonrefundable fee may be filed by the candidate in lieu of a petition.

The statutes which govern the election of OISD board members through the meeting process provide that the chairperson of the meeting may accept nominations for an available position “from the floor” if no candidates filed for the position. Consequently, in an instance where no candidates file for an available ISD position, the ballot must contain several lines for the hand entry of the candidates who receive nomination at the meeting.

### **Conduct of Meeting**

The President and Secretary of the OISD are responsible for convening and conducting any meetings held by the OISD to fill its board positions; County Clerks are not required to play any role in the conduct of the meetings.



Oakland Schools Board of Education  
Biennial Election  
June 1, 2026 – 5:30 PM  
2111 Pontiac Lake Road, Waterford, Michigan  
Oakland Schools Conference Center

## **AGENDA**

- |   |                |
|---|----------------|
| A. Meeting Called to Order  | 5:30 PM        |
| B. Roll Call  |                |
| C. Statement of Purpose of the Meeting  |                |
| D. Naming of Canvassers   | 5:35 PM        |
| E. Casting of the Ballots   | 5:40 – 7:30 PM |
| F. Declaration of Last Opportunity to Vote  | 7:25 PM        |
| G. Closing of the Polls   | 7:30 PM        |
| H. Canvass of the Ballots   | 7:30 – 7:40 PM |
| I. Announcement of Election Results<br><i>(if there is not a tie vote)</i>                | 7:45 PM        |
| J. Second and Subsequent Rounds of Voting<br><i>(if necessary, in the event of a tie)</i> |                |
| K. Announcement of Tie Vote Results<br><i>(if necessary, in the event of a tie)</i>       |                |
| L. Notarization of Results  |                |
| M. Acceptance of Office<br><i>(if successful candidate(s) are in attendance)</i>          |                |
| N. Visitor Comments   |                |
| O. Adjourn  |                |

March 11, 2026

Dear Local District Board Secretary:

The purpose of this letter is to advise you that an election for one (1) six-year term on the Oakland Schools Board of Education will be held on **Monday, June 1, 2026**.

Oakland Schools board members are elected by an electoral body composed of one (1) person designated by the board of each constituent school district. The Revised School Code prescribes that each constituent school district board must designate a representative to this electoral body by adopting a resolution which:

- a. Designates the person to vote in the election on behalf of the local district board;
- b. Directs the designee which candidate the board supports for each position to be filled; and
- c. Directs the designee to vote for those individuals, at least on the first ballot taken by the electoral body.

Designated electors must cast their ballots **in person** at the election scheduled to take place between 5:30–7:30 PM on Monday, June 1, 2026 in the Oakland Schools Conference Center located at 2111 Pontiac Lake Road in Waterford. **The revised ISD election law prohibits the acceptance of absentee ballots.**

Should a tie vote occur, it will be necessary for your district's Designate or Alternate to cast a second and subsequent ballot in person at Oakland Schools (Agenda Item J). The timeframe to cast a second and subsequent ballot will be open for one hour after the *Announcement of the Election Results* (Agenda Item I). It is highly recommended that your district's Designate or Alternate remain present at the Board Election through the *Announcement of the Election Results*. Please note that only the districts whose Designate or Alternate appear in person to cast a second vote, and subsequent rounds of voting, will be counted toward the tally of tiebreaking results. A district's ballot from the first round of voting or the supplied Resolution will not count toward a second, or subsequent, round of voting. The re-voting process will continue until the candidate with the greatest number of votes is elected.

After your board has adopted its resolution as prescribed, please provide a copy of the resolution to the Oakland Schools Superintendent's office **by 4 PM Friday, May 29, 2026** via fax at 248.209.2206 or email at [Nicole.Christian@oakland.k12.mi.us](mailto:Nicole.Christian@oakland.k12.mi.us). This will enable us to compile a list of district designees prior to the election date.

**Please note that no approved resolutions shall be accepted after this time/date. If the resolution is not filed, the constituent district will be unable to cast a vote during the June 1 election.**



2111 Pontiac Lake Road  
Waterford, MI 48328-2736  
Telephone: 248.209.2000  
[www.oakland.k12.mi.us](http://www.oakland.k12.mi.us)

Enclosed is a copy of the 2026 Election Timeline, Revised School Code, the Agenda for the June 1 Biennial Election, Candidate Nominating Guidelines provided by the Oakland County Elections Division, and a sample resolution to designate your district's representative(s) and selection of candidate(s).

If you have any questions regarding the ISD board election legislation or the ISD board election process, please contact Sherry McMillan at 248.209.2062 or by email at [Sherry.McMillan@oakland.k12.mi.us](mailto:Sherry.McMillan@oakland.k12.mi.us).

Your assistance is greatly appreciated.

Sincerely,

A handwritten signature in black ink, appearing to read 'Carol Finkelstein'.

Carol Finkelstein, Secretary  
Oakland Schools Board of Education

Encl

CC: District Superintendent

9.1.4. Updates and Remarks

9.2. Curriculum & Instruction

**Presenter:** Joe Youanes

9.3. Finance/Facilities and Bond

**Presenter:** Kathy Abela

9.3.1. Oakland Schools FY27 Budget

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**Support for General Fund Budget**

**ISD BUDGET RESOLUTION**

\_\_\_\_\_, Michigan (the "District")  
A \_\_\_\_\_ meeting of the board of education of the District was held in the  
\_\_\_\_\_ in the District, on the \_\_\_\_ day of \_\_\_\_\_, 2026  
at \_\_\_\_\_ o'clock in the \_\_\_\_\_.

The meeting was called to order by \_\_\_\_\_, President.

Present: Members

Absent: Members

The following preamble and resolution were offered by Member \_\_\_\_\_  
and supported by Member \_\_\_\_\_:

**WHEREAS:**

1. Section 624 of the Revised School Code, as amended, requires the intermediate school board to submit its proposed General Fund budget no later than May 1 of each year to the board of each constituent district for review; and

2. Not later than June 1 of each year, the board of each constituent district shall review the proposed intermediate school district General Fund budget, shall adopt a board resolution expressing its support for or disapproval of the proposed intermediate school district General Fund budget, and shall submit to the intermediate school board any specific objections and proposed changes the constituent district board has to the budget.

**NOW, THEREFORE BE IT RESOLVED THAT:**

1. The board of education has received and reviewed the proposed intermediate school district General Fund budget in accordance with Section 624 of the Revised School Code, as amended, and by the adoption of this resolution, expresses its support for the proposed intermediate school district General Fund budget.

2. The secretary of the board of education or his/her designee shall forward a copy of this resolution to the intermediate school board or its superintendent no later than June 1.

3. All resolutions insofar as they conflict with this resolution be and the same are hereby rescinded.

Ayes: Members

Nays: Members

Resolution declared adoption.

\_\_\_\_\_  
Secretary, Board of Education

The undersigned duly qualified and acting Secretary of the Board of Education of \_\_\_\_\_, Michigan, hereby certifies that the foregoing is a true and complete copy of a resolution adopted by the Board of Education at a \_\_\_\_\_ meeting held on \_\_\_\_\_, 2026, the original of which resolution is a part of the Board's minutes, and further certifies that notice of the meeting was given to the public under the Open Meetings Act, 1976 PA 267, as amended.

\_\_\_\_\_  
Secretary, Board of Education

# Original Budget

for the fiscal year 2026-27



## **Oakland Schools Enterprise-Wide Overview**

Oakland Schools is one of 56 Intermediate Schools Districts (ISDs) established in Michigan in 1962. ISDs are regional service agencies that provide support services to constituent district school personnel that are best delivered regionally, as measured by cost, size and quality advantages. Oakland Schools is an autonomous, tax-supported public school district governed by Michigan General School Law.

### **Our Mission**

Every Student. Every Day.

### **Our Beliefs**

We believe:

- It's about service.
- Students form the lens through which our best educational decisions are made.
- All students can and will learn.
- Collaboration builds understanding.
- Education is a shared responsibility.
- Our success depends upon our employees.
- Change is opportunity.
- Lifelong learning is a key to lifelong success.
- Effective relationships are powerful.
- Differences expand our thinking.
- Visionary leadership creates a dynamic environment.
- We must develop leaders for tomorrow.
- Ethical behavior is everyone's responsibility.

### **Our Credo**

Service, expertise, and excellence form the foundation of Oakland Schools. We prepare students to be meaningful contributors in a diverse society. Continuous learning drives our efforts to support local districts and the community while fostering a global perspective. Organizational strength and effectiveness come from inclusion, advocacy, innovation, and leadership. We share responsibility for leading the Oakland County educational community.

We believe our first responsibility is to the educators of Oakland County, their students and families. We believe that all students can learn, and will, given the right resources and time. Our services, products, tools, and knowledge are focused to support high levels of student achievement, maximize resources and meet compliance obligations. Through visionary leadership and inclusive relationships, we develop regional capacity for the continuous improvement of student learning.

We believe every employee can be highly productive. We support ongoing learning by providing necessary tools and resources. We hold one another to a high standard of professionalism, respect, integrity, and fairness. Together, we embrace a culture that promotes ideas and innovation as it encourages creativity and fun. We deliver high quality service as we advocate for every child.

We collaborate with the Oakland County community and develop strong partnerships with all levels of government, business, social agencies, and education to enhance the quality of life in this region. These collaborations strengthen teaching and learning and increase opportunities for Oakland County students as they graduate to a global economy. For all those with whom we work and whom we serve, we pledge to partner in practices that honor collaboration, responsible stewardship of public resources, transparent business practices and ethical behavior.

## **Our Objectives**

Oakland Schools' organizational strategies are centered around these three objectives:

- Increasing student achievement
- Serving the diverse needs of schools
- Decreasing costs and increasing efficiencies.

## **How We Are Funded**

Our proposed total funding for fiscal year 2026-27 is \$563.2 million:

- Property taxes - \$270.7 million
- Other local revenue and investment revenue - \$51.7 million
- State source revenue - \$24.8 million
- Other financing sources & indirect revenue - \$15.8 million
- Estimated grant award funding - \$200.2 million

*Note: Funding as presented is net of eligible inter-company eliminated Risk Related Activity Fund revenues.*

## **How We Use Our Resources**

Our proposed total expenditures for fiscal year 2026-27 are \$591.7 million:

- Salary, wage, and benefits - \$88.8 million
- Purchased Services, Supplies, Utilities & Dues/Fees - \$27.2 million
- Capital outlay - \$23.9 million
- Transfers to LEAs and other funds - \$233.4 million
- Grant related expenditures - \$200.2 million
- Payment on existing debt - \$18.2 million

*Note: Expenditures as presented are net of eligible inter-company eliminated Risk Related Activity Fund expenses.*

## **What's New or of Special Significance in the 2026-27 Oakland Schools Budget?**

### **Revenues**

Property tax revenue is budgeted to increase by 3.4%, or \$9.0 million. Taxable values have been increasing incrementally over the last twelve years and finally reached pre-recession levels in 2022-23. While taxable values in Oakland County are expected to increase just over 4.0%, the District is using a conservative estimate in the 2026-27 budget until actual taxable values are made available. Tax abatements leveled off significantly for several years after peaking in fiscal years 2012 and 2013, however an increase in tax tribunal challenges occurred in the last two years and the District carefully monitors open cases with the assistance of Oakland County Equalization. The District holds reserves for anticipated losses due to these abatements as all unfavorable judgments are the responsibility of the District.

### **Michigan Tax Tribunal Expense**

Michigan Tax Tribunal (MTT) judgments regarding property tax assessments have a direct impact on the expenditures of Oakland Schools. Unfavorable judgments result in the return of funds to the taxing authority with no recoupment of funds from the State of Michigan. As such, the District evaluates the risk of MTT losses with the assistance of Oakland County Equalization. The MTT reserve percentage for FY 2026-27 is budgeted at .25% of tax revenues, which equates to approximately \$676,700 in expense.

### **PA-18 Special Education Funding**

Oakland Schools receives property tax revenue for support of Special Education programs. In the last few years, the County has enjoyed healthy taxable value growth which correlates to increases in the amount that

can be provided to local districts via the PA-18 distribution. In FY 2026-27 there is growth projected in tax revenues of 3.4%. The base distribution of PA-18 funding to local school districts is budgeted to increase approximately \$5.2 million or 2.9% to \$189,106,200. Additional distributions may be made to local districts based on 2025-26 final audited financial results.

**Employee Positions**

There is a net 7.2 FTE increase in positions contained in the 2026-27 budget, including the following:

- (1.0) FTE – Human Resources Manager position has been eliminated
- (.5) FTE – Business Office Residency Program; reduction from four residents to three for a portion of 2026-27
- 1.0 FTE – Shipping/Receiving new Warehouse Supervisor position due to increased workload, replacing a position eliminated in 2024-25
- (.3) FTE –reduction in District & School Services Pupil Services part-time staff
- 6.0 FTE – Special Populations new unit, Continuum of Supports (see discussion below in this executive summary)
- 2.0 FTE – Technology Services Artificial Intelligence (see discussion below in this executive summary).

**Personnel Costs**

- Step increases for those employees who are eligible have been built into the 2026-27 budget; additionally, an across-the-board pay increase of 2.0% has been included in the proposed budget for all staff. This increase is consistent with union salary changes in the current collective bargaining agreement which expires June 30, 2027.
- Regarding the State-mandated retirement rate, there are 8 rates in effect, depending on the hire date of employees and their choices for eventual retirement benefits. The most common employee choice is for the Basic/MIP plan with Health Care Premium Subsidy. That rate is 29.91% through September 30, 2026, and will be reduced to 27.51% beginning October 1, 2026. Oakland Schools analyzed its own employee retirement elections and has projected an overall blended retirement rate of 26.53% for 2026-27, which includes employer contributions to Defined Contribution plans and the Personal Healthcare Fund.
- The “Hard Cap” for employee health care costs remains in effect for all labor groups. The hard cap dollar limits that employers may pay are subject to annual adjustment based on the medical consumer price index, over which the school district has no jurisdiction. Growth in the medical consumer price index of 4.0% has been budgeted for 2026-27. This projection results in the following dollar limits used in this budget:

	Plan year beginning after 1/1/26	Plan year beginning after 1/1/27*
Family	\$ 21,660.30	\$ 22,526.71
Individual plus one	\$ 16,609.38	\$ 17,273.76
Single	\$ 7,942.09	\$ 8,259.77

*\*projected, assuming growth in the Medical CPI of 4.0%*

**Artificial Intelligence (AI) Strategy and Capacity Building**

Since establishing the AI Strategy and Innovation function within Technology Services, Oakland Schools has moved from vision to execution. In September 2025, we hired the Director of AI Strategy and Innovation to lead a comprehensive AI strategy building upon the AI foundation that was laid, including

supporting the 28 districts we serve. This role delivered on the commitment in last year's budget narrative and positioned Oakland Schools to lead with clarity in a rapidly shifting environment.

This year's budget advances that strategy through two critical hires that complete the foundation of an operational AI team:

- **AI Solutions Architect**  
Provides the technical backbone for vetting, evaluating, and developing AI solutions that improve internal operations and ensure responsible adoption.
- **AI Implementation Consultant**  
Works directly with Oakland Schools staff, district leaders, and educators to deliver professional learning, cohort based programs, and hands on consultation that moves districts from awareness to sustainable implementation.

This budget investment is about protecting districts from unmanaged AI risk, accelerating responsible innovation, and ensuring Oakland Schools remains the indispensable partner districts rely on to navigate complexity and improve outcomes for every learner.

Planned initiatives include district embedded consultation, superintendent level briefings informed by needs assessment data, expanded cohort based learning aligned to national frameworks, and continued development of policy, procurement, and governance guidance as the AI landscape evolves.

### **Focus on Cybersecurity**

The cybersecurity threat environment continues to intensify, and schools remain a high value target. Technology Services has made strategic, layered investments that reduce risk, strengthen resilience, and expand countywide protection.

Budget support sustains and expands protections already deployed, including:

- Managed mobile access through our mobile device management platform
- Cybersecurity awareness training through monthly staff training and phishing exercises, plus improved end user reporting and rapid quarantine workflows
- Enhanced server security tools to monitor and protect approximately 700 servers against data exfiltration and compromise
- Strengthened security posture across Oakland Schools supported applications and devices through vulnerability identification and remediation
- Multi factor authentication across critical systems to prevent unauthorized access
- Automated threat detection through a Security Information and Event Management platform, now extended as an option to local districts at no charge
- Endpoint Detection and Response capabilities to secure connected devices
- Network stability and continuity through mitigation of Distributed Denial of Service attacks
- Ongoing culture building to reduce human risk through awareness and simulation
- Expanded district security partnership programs:
  - Internal and external penetration testing services
  - Shared SIEM capabilities for improved threat visibility
  - Phishing simulation and cybersecurity awareness training platforms for field service districts

### **Special Populations Continuum of Supports**

A new unit within Special Populations will be introduced for the 2026-27 school year. This unit was designed to address the varying levels of expertise, staffing, and resources among local education agencies; additional areas of support for districts that were identified by the center program workgroup. The ISD must play a stronger role in ensuring that students receive appropriate services in their least restrictive environment whenever possible. This new unit will provide dedicated, specialized support

focused on building local district capacity to serve complex students in their least restrictive environment. The unit will guide district teams in data-based decision-making and provide targeted consultation, professional learning, coaching, and direct problem-solving support. The unit will work collaboratively with local districts to:

- strengthen programming for students with complex needs
- support teachers and support staff through training, coaching and consultation
- reduce inappropriate referrals to center programs
- ensure students receive FAPE while remaining in local settings
- promote consistent, evidence-based practices across the county
- ensure fidelity of Leveled Program implementation in LEA's and PSA's.

### **Social-Emotional Wellbeing and Mental Health Support**

Oakland Schools remains committed to supporting the social-emotional well-being and mental health needs of students and educators across our districts. As the demand for these services continues to grow, we are expanding our resources and partnerships to further strengthen mental health support at all levels.

In 2026-27, our mental health team will continue to provide critical support in key areas:

- *Expanding Tier 1 Supports* – Increasing access to Question, Persuade, Refer (QPR) training, Positive Behavioral Interventions and Supports (PBIS), Restorative Practices, and Social-Emotional Learning (SEL) strategies to promote student and staff wellbeing.
- *Enhancing School Safety* – Strengthening both physical and psychological safety through the PREPaRE curriculum, the I Love You Guys Foundation training, Behavioral Threat Assessment and Management, and additional crisis-response initiatives.
- *Advancing Suicide Prevention and Postvention* – Providing professional learning on updated suicide prevention strategies and postvention supports to respond effectively in times of crisis.
- *Improving Crisis Prevention and De-escalation* – Expanding training in Behavioral Supports, Nonviolent Crisis Intervention (CPI), and Life Space Crisis Intervention (LSCI) to equip school staff with strategies for preventing and safely managing crisis situations.
- *Developing School-Based Mental Health Systems* – Continuing to help districts build and sustain comprehensive mental health frameworks that integrate school, community, and state-level supports.

Additionally, we are working closely with districts to maximize the impact of state categorical funding, including:

- *31n Funding* – Supporting the continued expansion of licensed, school-based mental health professionals to increase Tier 2 and 3 interventions.
- *31p Funding* – Helping districts implement three-tiered SEL curricula to promote emotional resilience and wellbeing at all grade levels.

### **Crisis Response & Trauma Support**

Oakland Schools remains a key partner in providing direct support to districts experiencing traumatic events. We continue to offer crisis response and recovery assistance, including ongoing consultation for districts and expanded support for districts impacted by trauma. In the 2026-27 school year, we will build on our crisis response efforts by strengthening trauma-informed and restorative approaches and increasing district capacity to address both immediate and long-term student and staff needs.

### **Comprehensive Safety & Threat Assessment Training**

- *PREPaRE Training* – Oakland Schools continues to partner with the National Association of School Psychologists (NASP) to provide PREPaRE (Prevent, Reaffirm, Evaluate, Provide and Respond, Examine) training. Our team of PREPaRE trainers continue to expand their work with

districts to enhance school crisis prevention, response, and recovery planning. As of January 5, 2026, we have 695 Oakland County educators/professionals trained in workshop 1 with representation from 21 of our 28 districts. Workshop 2 has representation from 27 of 28 districts with 427 Oakland County educators/professionals trained.

- *I Love U Guys* - The “I Love U Guys” Foundation provides training for Pre-K through 12th grade schools, higher education, businesses, and municipal settings focused on standardized language for response to crisis situations. Additionally, they provide a standard method and all materials for locations to activate the reunification annex if necessary. As of February 1, 2026, Oakland Schools has provided four trainings for our county.
- *Behavioral Threat Assessment and Management (BTAM)* – In collaboration with the Michigan State Police, Oakland Community Health Network, and national experts, we are expanding access to countywide training on the BTAM model. Our in-house trainers will continue to build district capacity to assess and manage potential threats while strengthening relationships with community partners. In addition, we were able to offer Advanced BTAM this year and are offering eighteen districts the opportunity to participate in a Training of Trainers, as a means to quickly scale up district capacity in order to be prepared for compliance with the new legislative requirements that take effect October 1, 2026. As of February 25, 2026, we have 663 Oakland County educators from 23 of our 28 districts and 26 Oakland County resource officers participating in this training.
- *Comprehensive School Suicide Prevention* - In partnership with Dr. Steven Brock, we have expanded our offerings around comprehensive school suicide prevention to offer more in depth work around suicide assessment, prevention strategies, and postvention response. As of February 25, 2026, we have 313 Oakland County Educators that have taken part in this training, from 26 of our 28 districts in Oakland County.

### **Intensive Mental Health & Complex Behavior Support**

Our mental health team will broaden access to specialized support services, including:

- *Life Space Crisis Intervention (LSCI)*, which is a set of strategic and tailored verbal intervention strategies to help staff prevent, defuse, and process "crisis" situations in schools involving dysfunctional thinking and student misbehavior, and to assist students in developing more usable self-management skills.
- *Non-violent Crisis Intervention (NCI)*, which provides professional staff with the skills to safely recognize and respond to students in crisis situations. This program promotes the philosophy of Care, Welfare, Safety, and Security, and may help to proactively deescalate students in crisis, reduce the risk of injury; and comply with legislative mandates.

As we look ahead to 2026-27, Oakland Schools remains dedicated to fostering safe, supportive learning environments and providing districts with the expertise, training, and resources they need to address the ever-evolving mental health needs.

### **Nanotechnology, Artificial Intelligence and Synthetic Biology (NAIS) Lab**

Our Nanotechnology, Artificial Intelligence, and Synthetic Biology lab will serve our local districts and public school academies as a resource they can visit during the school year. In this lab, located at the Southeast Technical Campus, students and educators will explore cutting-edge technologies firsthand. Nanotechnology involves manipulating materials at the molecular level to create new substances and devices with unique properties. Artificial Intelligence encompasses developing intelligent systems capable of tasks typically requiring human intelligence, such as problem-solving and decision-making. Synthetic Biology integrates principles from biology and engineering to design and construct novel biological components and systems. Through visits to the lab, students will gain exposure to these exciting scientific fields, preparing them for future opportunities and technological advancements. The 2026-27 budget contains funding for 2.0 FTE for Nanotechnology Consultants (approved in 2024-25)

within the Career Focused Education Fund budget and capital budgets for equipment and lab buildout within the CFE Campus Renovations Capital Projects Fund. We anticipate districts will be able to fully access this service during the 2027-28 school year.

### **Mobile STEM Classroom (STEMi)**

Oakland Schools Administration and Student Services deployed a mobile Science, Technology, Engineering & Math (STEM) classroom called “the STEMi” in 2021. FY 2026-27 Capital Projects Fund budgets include estimated costs for capital needs and the Career Focused Education Fund budget includes lease costs for the vehicle and estimated costs of operating the STEMi. We are approaching the end of our original lease period and are excited to introduce new activities and functionality in the updated STEMi beginning in the 2026-27 school year. New features include an interactive design wall, Drone Racing League (DRL) simulator, new robotics and AI interactive equipment, among others. The mobile classroom is utilized by Oakland Schools’ constituent districts to supplement and extend their existing career readiness curriculum, instruction and assessments. The STEMi is fully booked at all 28 school districts and public school academies for the 2025-26 school year. The Board of Education receives quarterly access and impact updates from Student Services.

### **Oakland Schools Technical Campus Renovations**

Oakland Schools recently completed a two-year project to renovate and refresh our four technical campuses. Renovation work consisted of the following:

- Phase I – Construction of secured entrances for all four Oakland Schools Technical Campus (OSTC) buildings. The renovations improved safety/security infrastructure and enhanced the student and guest experience. Included in the secured entrances are Welcome Centers for visitors waiting to be screened for entry into the building. In addition to providing important security controls, the Welcome Centers highlight OSTC academic programs, events and awards.
- Phase II – Consisted of the OSTC corridor refresh projects and parking lot replacements at all campuses. Improvements included updating corridor lighting, flooring, wayfinding, and program identification for all four campuses. Also included were upgrades to student collaboration spaces in common areas of the building. The project also included replacement of all parking lots and drives along with security gates at strategic locations.

Technical campus planned improvements in the 2026-27 year include the replacement of Southeast Campus rooftop units and lighting controls upgrades at all campuses in addition to the Nanotechnology lab buildout.

### **Special Collaborative Projects**

#### *Business Office Residency Program*

Oakland Schools Administration, in collaboration with local district stakeholders, developed a Business Office Residency Program that launched in June 2024. The program was created in response to significant turnover and retirements within local district business offices, coupled with the lack of a sustainable pipeline to fill these vacancies.

The residency is a two-year program in which a cohort of participants receives comprehensive technical training, leadership development, and preparation toward Michigan School Business Officials certification. Participants include individuals hired by Oakland Schools as well as staff currently employed in local district business offices. In addition to the training and certification components, Oakland School employees are placed as interns within local districts, providing them with valuable, real-world experience.

The inaugural cohort consists of four Oakland School employees and nine local district staff members. Upon completion of the program, participants are expected to be well prepared to assume leadership roles

within local district business offices. The program has experienced a highly successful first year, and the current cohort will continue its training through the 2025–26 school year. The 2026-27 budget contains funding for a second cohort, recruitment for which will begin in Spring 2026.

#### *Human Resources Leadership Academy*

Oakland Schools launched the Human Resources Leadership Academy (HRLA) in 2024-2025 as a two-year leadership development program designed to cultivate future human resource leaders across the county. The program blends training with hands-on experience, preparing participants to step into HR leadership roles in Oakland County.

In the first year, participants engaged in professional development, gaining foundational knowledge and skills. The second year focused on project-based learning within a district setting, where participants tackle real-world HR challenges. Year two includes a capstone project that focuses on critical HR areas, including recruitment, performance evaluations, employee training, and retention. Through these capstone projects, participants develop practical solutions that enhance HR practices, ensuring they are prepared to step confidently into a leadership role.

In the 2026-2027 school year, we will welcome our third cohort into the program.

The General Education Fund is fully funding both the Business Office Residency and HR Leadership Academy programs.

#### *Literacy Essentials Oakland*

The Literacy Essentials Oakland (LEO) project is a multi-year initiative aimed at ensuring early literacy success for children in Oakland County. Established in 2019-20, the project remains rooted in research and is grounded by these goals:

1. Enhanced, equitable instructional practices grounded in research
2. Increased effectiveness of instructional leaders
3. Increased system coherence

In 2025-26, we made significant progress in ensuring educational excellence via the following indicators:

- Metrics analytics indicate strength in coaches spending a majority of their time working directly with teachers to improve student learning.
- LEO leadership teams are adjusting services to strengthen the use of short-term data cycles to drive instructional decisions.
- Collaboration with state-funded literacy coaches continues, supporting full coaching cycles, evidence-based practices, and alignment with PA 146, K-12 Literacy and Dyslexia Law.

Looking ahead, Literacy Essentials Oakland will focus on strengthening the systems that sustain high-quality literacy instruction across districts. This includes enhanced and more coordinated support for literacy coaches, recognizing their critical role in building educator capacity and supporting implementation at the classroom level. The project will also prioritize stronger collaboration between the District and School Services (DSS) and Special Populations departments within Oakland Schools to ensure coherence, shared expertise, and aligned guidance for districts. Finally, continued emphasis will be placed on deepening Tier 1 instruction, supporting districts in strengthening their foundational literacy systems in ways that both meet the requirements of PA 146 and fully reflect the evidence-based instructional practices called for in the law—ensuring access and success for all students.

Oakland Schools is providing up to \$5 million for Literacy Essentials Oakland.

*Numeracy Initiative (EPIC – Essential Practices in Instruction ⇌ Capacity & Coherence)*

The Numeracy initiative was launched in the 2024-25 school year in response to declining performance from 3rd-6th grade on the Mathematics M-STEP. This project is designed to increase an organization's capacity to support effective mathematics practices leading to increased student outcomes in mathematics.

The program has three goals:

1. Increase and enhance teachers’ use of equitable research-informed tier 1 instructional practices that support student learning
2. Increase instructional leaders’ efficacy and effectiveness to support tier 1 instruction
3. Increased system coherence

Even though this initiative is in its early stages, good progress has already been made and will continue into 2026-27 with the following supportive data:

**EPI⇌C<sup>2</sup> NAIL & Principal efficacy data received from a CCI Survey**

Question (out of a 4.0 rating)	Fall 24-25	Fall 25-26	Change
I am able to influence district-level decisions.	3.19 (n=22)	3.26 (n=27)	<b>+.07</b>
	3.30 (n=33)	3.47 (n=30)	<b>+.17</b>
I have a voice in how this team focuses its efforts/time.	3.41 (n=22)	3.44 (n=27)	<b>+.03</b>
	3.61 (n=33)	3.77 (n=30)	<b>+.16</b>
My contributions to the team are valued.	3.41 (n=22)	3.59 (n=27)	<b>+.18</b>
	3.70 (n=33)	3.80 (n=30)	<b>+.10</b>

2026-27 will focus on:

- Adding more non-administrative instructional leaders.
- Including more teachers in PDSA cycles.
- Extending PDSA cycles from 3rd through 8th grade.
- Serving more students.

*HR/Finance Consortium*

The HR/Finance Consortium Fund was established in FY 2012-13 as a result of a collaborative effort between Oakland County school districts to select a countywide Enterprise Resource Planning (ERP) system for HR and financial applications. The school districts formed a consortium called the Michigan Partnership for Essential Education Resources (MiPEER).

The MIPEER Consortium is a strategic alliance between Oakland Schools and 20 districts that streamlines ERP services through BusinessPlus. By centralizing systems and support for finance, HR, and payroll, the consortium delivers standardized software, high tier support, and improved compliance readiness.

This budget sustains the technical team and infrastructure that make the consortium viable, including database administration, system analysis, hosting, monitoring, upgrades, and user support. It also supports

proactive compliance work that keeps districts aligned with changing regulations and operational requirements.

Core value drivers include:

- A dedicated technical backbone that secures and manages software and hardware infrastructure
- Proactive compliance alignment through continuous process recalibration
- End to end lifecycle management including testing, upgrades, training, and advisory governance

This model protects district operations, reduces duplication, and provides a predictable cost structure for essential business systems.

*MiServiceDesk*

The Oakland Schools Service Desk oversees MiServiceDesk, which provides tier 1 support for essential statewide education systems. This service is a critical reliability layer for Michigan districts and stakeholders and operates as the technical support division of the Michigan Collaboration Hub, led by Intermediate School Districts and MAISA.

Funding in the upcoming year sustains the staffing and tools required to maintain consistent service levels, timely issue resolution, and strong customer experience for statewide solutions that districts depend on daily, including:

- MiStrategyBank
- MICIP
- MiRead
- EduPaths
- MiEarly Childhood Connect
- Michigan Data Hub
- MiEWIMS

This investment protects statewide continuity and reduces disruption in compliance reporting, instructional planning, and data access.

**Financial Subsidies for Cooperative Services**

Oakland Schools provides financial subsidies to support several cooperative agreements with constituent districts. The following financial subsidies are incorporated in the FY 2026-27 budget:

<b>Department</b>	<b>Description</b>	<b>Budgeted Subsidy Amount</b>
Students Services (Career Readiness)	Career cruising software (Xello)	\$ 360,000
Students Services (Career & Technical Education)	CDX Automotive software	\$ 31,400
Students Services (Career Readiness)	Industry connections platform Pathful (Nepris)	\$ 250,000
Students Services (Career Readiness)	Alumni Pathways - Lightcast (Economic Modeling)	\$ 45,000
District & School Services	Illuminate DnA student assessment & data analysis tool	\$ 376,000
District & School Services	Discovery Education Streaming - digital video on demand and online teaching	\$ 78,000
District & School Services	Atlas Rubicon curriculum management system	\$ 217,300
District & School Services	STAMP (STAndards-based Measurement of Proficiency) assessments	\$ 60,000
	<b>TOTAL SUBSIDIES</b>	<b>\$ 1,417,700</b>

*Note: This reporting is required by Board Policy 3230. Subsidies do not include the cost of staff FTE providing direct district support.*

In addition to the above financial subsidies, the District provides dedicated staff to support the MiStar student application and the PowerSchool application for the MiPEER consortium. Distributions are also made directly to districts for PA-18 special education funding, Career and Technical Education (CTE) transportation reimbursement and CTE regional programming funding. Details of those distributions can be found in those funds' specific budget sections of this document.

## **What We Do - Programs & Services**

Oakland Schools remains committed to making strategic investments in both current programming and new initiatives that enhance collaboration, efficiency, and impact for our constituent districts. The 2026-27 budget reflects our dedication to ensuring fiscal responsibility while maximizing the return on investment for school districts. By leveraging regional partnerships, emerging technologies, and cost-saving measures, we continue to support the evolving needs of Oakland County's students and educators.

### **District and School Services**

The District and School Services (DSS) Department strategically allocates resources to provide high-quality support to all Oakland County learners. Our budget prioritizes:

- Cost-effective professional learning opportunities for educators
- Expanding collaborative networks to drive best practices across districts
- Consultation services that assist school and district leaders in implementing high-impact strategies
- Development of instructional resources that maximize district investments in student learning
- Advocacy at the state and national levels to secure additional funding and resources for Oakland County schools
- Securing consortium pricing and cost-saving opportunities to reduce financial burdens on districts

The following services are provided as part of Oakland Schools' core mission to support districts at no additional cost:

- *Professional Learning Investments* – Expanding context-based, scalable models and research-based educational strategies
- *Networking Groups* – Facilitating educator collaboration through role-specific leadership development and networking cohorts
- *Consultation Services* – Assisting districts with learning models, assessment system redesign, AI integration, and implementation of multi-tiered support systems (MTSS)
- *Resource Development* – Investing in digital innovation, including the expansion of miPLACE and the development of interactive instructional content aligned with Michigan's educational priorities
- *Supporting State Accountability Schools* – Providing enhanced supports for schools identified through the state system of support, and strengthening improvement strategies for Comprehensive Support and Improvement Schools
- *Early Childhood Services* – Expanding early intervention programs, community partnerships, and family resources to improve long-term student success

The services below are offered on a cost-recovery basis or through consortium pricing to provide districts with high-quality, cost-effective solutions:

- *Consortium Pricing & Procurement* – Negotiating discounted pricing on assessment tools, curriculum mapping systems, and digital learning platforms such as Atlas Curriculum Mapping System, Illuminate DnA, and STAMP proficiency assessment
- *Data and Analytics Solutions* – Offering access to advanced analytics platforms for student performance monitoring and predictive data modeling

- *Technical Assistance and Specialized Programs* – Supporting districts with specialized technical assistance, compliance guidance, and tailored district improvement initiatives

### **Early Childhood**

Early Childhood is a unit within DSS that works with schools, families, and other agencies to support the school success of children from birth to kindergarten by developing, evaluating, and improving high-quality early childhood programs. These efforts save local districts thousands of dollars by supporting school readiness, early identification of developmental, learning and behavioral challenges, and strategic cost-saving initiatives.

Our Early Childhood team provides the following services to our constituent districts at no additional cost:

- Providing direct assistance, resources and outreach to young learners and their families to promote school readiness.
- Supporting program administrators with technical assistance to ensure compliance with state and federal regulations, licensing rules and grant requirements.
- Coordinating county-wide preschool recruitment marketing campaigns, saving districts an estimated \$160,900 annually.
- Managing centralized care coordination to determine child eligibility for GSRP, resulting in an estimated savings of \$475,400 in 2025-2026.
- Securing over 200 start-up and expansion grants, leveraging over \$5.0 million to expand access to GSRP.
- Providing developmental screening and referral coordination for GSRP programs, generating \$47,700 in savings while strengthening early identification systems.

The following services are provided by Early Childhood on a cost-recovery basis:

- *Early Childhood Specialists (ECSs)* – Supporting GSRP preschool teaching teams and site administrators across 28 LEAs, 6 PSAs, and 62 community-based organizations. Oakland Schools recruits, trains, monitors, and coaches ECSs, saving districts approximately 40% in staffing and administrative costs.
- *Online Child Assessment Tool* – Coordinating a county-wide purchase of the COR Advantage child assessment tool, reducing per-child licensing costs by 47% and generating more than \$75,000 in countywide savings. Also coordinated 500 Teaching Strategies GOLD licenses, saving programs more than \$7,000 through bulk purchasing.
- *High Scope GSRP Professional Learning* – Providing HighScope curriculum training for GSRP teachers and administrators at substantially reduced rates, lowering professional learning costs up to 70% and saving districts more than \$250,000 in registration and travel expenses.

### **Student Services**

The Student Services Department provides direct instructional programs for K-12 students and consulting services for local districts throughout Oakland County.

- Student Services provides consultation, professional development and employer-based experiences for the core content areas as well as CTE programming.
- Student Services has worked collaboratively with our 28 local districts to roll out a K-12 Career Readiness system in Oakland County. This system is guiding students, parents and educators to help students make informed career preparation decisions, developing the skills and knowledge needed to be successful in their chosen career and preparing them for post-secondary education or direct employment.
- Professional development and technical assistance (via a gradual release professional learning model) is provided to educators, parents and community members throughout Oakland County and beyond.

- Student Services provides leadership and support for a variety of student programs. This includes the ACE Program and the VLAC K-12 programs. In addition, Student Services operates the four technical campuses serving approximately 2,600 – 2,700 students each semester from all 28 constituent districts.

### **Special Populations**

The Special Populations Department is dedicated to providing quality services and support intended to strengthen the capacity of Oakland County public school districts. In partnership with local districts and community agencies, the department strives to improve the educational achievement and well-being of all students with disabilities.

The Oakland Schools Special Populations Department provides services to all local districts, public school academies and nonpublic schools in Oakland County on behalf of the approximately 22,800 students with an Individualized Education Program (IEP) as well as students requiring community support programs.

Coordinated ISD services support districts by providing Educational Audiologists, Orientation and Mobility Specialists, and teacher consultants for students with low-incidence disabilities. These professionals deliver high-quality instruction, consultation, and evaluations, and ensure access to services that promote student achievement. Audiological services are available to support eligibility evaluations, provide hearing assistive technology, and conduct assessments for preschool-age students to rule out hearing loss. Additional supplemental and related supports, including specialized assistive equipment and services, are also available. The Materials Center coordinates the procurement, preparation, delivery, and ongoing support of assistive equipment and alternate format instructional materials for students with IEPs.

Professional learning opportunities are offered throughout the year and are designed to address the county's identified needs, using student achievement data, compliance indicators, district input, and current educational initiatives. These opportunities focus on strengthening instruction for students with disabilities with IEPs and improving student outcomes. Oakland Schools also offers an annual Special Populations Summer Conference to build the capacity of staff who support students in self-contained and center-based programs, serving our most complex learners. This multi-day conference offers foundational shared learning experiences and a variety of targeted sessions that participants can use to deepen their knowledge. Stipends and substitute reimbursement are available for eligible staff.

Technical assistance to meet mandatory compliance regulations occurs in many forms. The ISD has staff available by phone and email to assist parents and districts in creating a positive, supportive learning environment that meets the needs of students with IEPs.

### **Technology Services**

Technology Services delivers enterprise grade systems, solutions, and support that enable teaching, learning, and operations across public and nonpublic schools throughout the region. Our work supports districts in running stable, secure, and compliant technology environments.

Our service portfolio includes integrated online applications that support student information, human resources, finance, payroll, and academic systems. We also provide technology planning, network infrastructure, telecommunications, ONE fiber network technical support, internet connectivity, audiovisual solutions, and general technology assistance. Districts continue to partner with Oakland Schools for technology services as a cost effective and high-quality alternative to commercial solutions. In addition, we offer end-to-end technology support to districts on a cost recovery basis, providing predictable access to premium IT capabilities.

This budget supports three primary outcomes:

1. Reliable operations for students, staff, and families
2. Stronger cybersecurity and risk reduction across the county
3. Scalable innovation and modernization, including artificial intelligence, without sacrificing safety or governance

#### *Student Systems and Data Services*

The Student Applications team provides comprehensive support through two models:

- **MISTAR Q** serving 15 local education agencies and seven public school academies
- **MISTAR Lite** supporting 13 local education agencies

MISTAR Q functions as a full student information system, centralizing data, streamlining compliance reporting, and integrating with platforms such as Canvas and Google Classroom. MISTAR Lite supports districts using alternative student information systems by providing student directory management and Medicaid billing support.

The MISTAR Q consortium, in partnership with Wayne RESA and Aequitas Solutions, includes a strong governance structure with a user group and steering committee that drives strategic direction. Current work focuses on student support and success tracking including MTSS and accommodations, and real time analytics.

The team is also exploring expansion of the support framework to accommodate additional student information platforms, with the goal of creating more consistent countywide application support services across districts.

#### *Direct District Support through Field Services*

Technology Services delivers comprehensive IT support to 15 local districts through a cost-effective service model. Field Services provides year-round onsite support with highly technical staff who combine strong customer service with deep infrastructure and systems expertise. This team also supports long range district initiatives, including bond implementation, capital refresh cycles, construction technology integration, and strategic technology planning.

The budget supports staffing, tools, training, and service capacity that districts rely on for continuity and for timely resolution of issues that would otherwise interrupt instruction and daily operations.

#### **Production, Printing & Graphics**

Production, Printing & Graphics (PP&G) was established to support the printing needs of Oakland Schools and its local districts. Since its inception, the program has consistently delivered high-quality materials including brochures, booklets, programs, business cards, calendars, newsletters, posters, and more, at rates below standard market pricing. Committed to growth and innovation, PP&G have recently expanded its capabilities and streamlined workflow with new equipment, enabling in-house production of lawn signs, acrylic signage, direct-to-foam core printing, and a variety of rigid and specialty substrates, including golf balls and baseballs, all while maintaining low costs.

#### **Other Operational Areas of Oakland Schools**

- Administrative Services provides coaching for newly placed superintendents, governance training for superintendent/board teams, and leadership training for administrative teams.
- Auxiliary Services, Maintenance and Facilities Operations works with local districts in the county to share information and help improve facility management effectiveness. Collaboration among local districts allows for shared knowledge, networking and operational efficiencies.

- Facility Operations is committed to providing a safe, clean and healthy environment within our buildings and on our campus grounds. Team members strive to provide services in an efficient and cost-effective manner.
- The district continues to promote its Green Schools initiatives. The Michigan Green Schools Program encourages public and private schools to participate in environmentally friendly and energy-saving activities. There are 85 schools in the County that are participating.
- Communication Services collaborates with communications professionals across local districts, offering support and skill enhancement opportunities through tailored professional development initiatives. Our dedicated team publishes an informative District Service Report annually, ensuring transparent communication and highlighting achievements. Moreover, we prioritize the dissemination of pertinent educational topics through multiple social media platforms. Additionally, our team offers comprehensive assistance to local school districts, addressing their unique communication and marketing needs, including crisis communication upon request.
- Government Relations advocates for and communicates the impact of legislation on public education and coordinates services with other federal, state and county agencies.
- Pupil, Corporate and District Services provides assistance to our constituent public school districts ensuring accountability of all student populations with pupil accounting audits, truancy, residency, schools of choice, MEIS liaison, home schooling, legal services, and legislative services.
- Financial Services provides accurate, timely and detailed information to all internal and external stakeholders with an emphasis on transparency, collaboration and continuous improvement. The department provides direct and indirect operational support and best practice-based training to all of our constituent districts upon request. Financial Services provides fiduciary oversight of the financial resources of Oakland Schools.
- The Medicaid Billing Services program provides billing services to all school districts and is expected to generate approximately \$18.2 million of revenue for LEAs in FY 2026-27.
- Business Office Shared Services assistance on a limited scope is provided to one constituent district.
- The Human Resources department administers the Oakland Human Resources Consortium (OHRC) providing recruitment and job posting services.
- Child Nutrition provides consulting services for all federal child nutrition programs operated in Oakland County including school lunch, breakfast, after-school snack/supper programs, Summer Food Service and special grant programs. Services provided to districts include USDA food purchasing cooperative, professional standards training, technical assistance and operations consulting services. Child Nutrition staff have been instrumental in leading the effort to get universal free meals in public schools permanently.
- Event Management organizes, hosts and services professional learning opportunities. The Oakland Schools conference center provides meeting, conference and training space for educational, community and special events.
- The Office of Procurement & Contracting coordinates the procurement process and provides links for our constituent districts to county, state, and national purchasing programs and cooperative purchasing opportunities.
- Pupil Transportation provides MDE school bus safety education training; efficiency reviews; implementation, training and support for transportation-related applications; consultation for MDE required reports; training and support for transportation staff and committees and cooperative purchasing support for transportation needs.

### **Collaborative Program Development Initiative**

The Collaborative Program Development Initiative (CPDI) is a program designed to provide “seed funding” for new and innovative initiatives, programs and ideas among our constituent local districts. Most recently,

CPDI funds have been used for the Literacy Essentials Oakland (LEO) initiative and the EPIC Math initiative which kicked off in 2024-25.

### **Notable Fee-Based Programs**

#### *Virtual Learning Academy Consortium (VLAC) K-8*

- The District’s online educational program for K – 8<sup>th</sup> grade students is projecting an enrollment of 250 FTE. Tuition is projected at \$6,450 per pupil for Oakland County residents and \$6,650 for non-resident pupils, which represents no increase from 2025-26 rates.

#### *Virtual Learning Academy Consortium (VLAC) 9-12*

- In the VLAC 9-12 program, students previously participating in the K-8 program can continue their virtual educational program through high school. Enrollment is projected at 300 FTE and tuition is \$6,700 per pupil for Oakland County residents and \$6,900 for non-resident pupils, which represents no increase from 2025-26 rates.

#### *Oakland Accelerated College Experience (ACE)*

- In this program, students from Oakland Schools’ constituent districts have the opportunity to attend their district’s high school as well as Oakland Community College. This opportunity allows students to earn up to 60 transferable college credits, an associate degree or a certificate of completion while extending high school through year 13. The preliminary enrollment is estimated at 300 students. Tuition is \$4,900 per pupil, which represents no increase from 2025-26 rates.

#### *Secondary Online Programs*

- The District, in partnership with Graduation Alliance, offers a specialized educational program and support services to provide students who have dropped out of school with an opportunity to complete their coursework and graduate from high school. It also services students who have been expelled or placed on long-term suspension. This program is being offered to Oakland County students on a cost-recovery basis.

#### *Foreign Exchange Programs*

- This is a high school study abroad program in which students from other countries can spend a year in several Oakland County high schools. The District is partnering with KCK, Inc. to provide this experience and is budgeting for approximately 30 students to participate in FY 2026-27. Participating districts will also have the opportunity to apply for a mini-grant up to \$5,000 to support their foreign exchange enrichment activities.

### **Oakland Schools Economic Environment & Forward Planning**

Oakland County remains one of Michigan’s most significant economic centers, contributing more than 22 percent of the state’s GDP and benefiting from a highly educated workforce, strong professional employment base, and relatively low poverty rate. Despite these long-term strengths, the local economy has experienced a recent slowdown. Employment growth weakened in 2024, with a modest decline in payroll jobs and a small rise in unemployment, reflecting broader economic headwinds affecting Michigan and the nation. Even so, Oakland County’s labor market continues to perform comparatively well, with unemployment rates historically below the state average and a workforce characterized by high levels of educational attainment and professional occupations.

Looking ahead, economic growth in Oakland County is expected to remain modest but positive through 2027. Total employment is projected to grow at an average annual rate of approximately 0.5 percent—slower than the 2 percent growth experienced during the decade following the Great Recession. Several industries are expected to drive job gains, particularly private health and social services, finance and

insurance, and construction. However, employment in manufacturing and professional and technical services has declined in recent years and is expected to recover only gradually. The region's economy is also closely tied to the automotive industry, making it sensitive to global trade policies and tariffs that could raise production costs and slow vehicle sales in the short term.

Despite these near-term uncertainties, Oakland County's economic fundamentals remain strong and position the region for continued long-term prosperity. Small businesses play a critical role in the local economy, representing nearly 90 percent of all firms and paying wages that rank among the highest compared with similar counties nationwide. Real wages are projected to continue rising modestly through 2027, remaining above the statewide average. Combined with a highly skilled labor force and strong industry diversity, these factors support a stable economic environment and continued opportunities for employment and business growth across the county.

Oakland County takes education very seriously. The County's education initiative, Oakland80, sets a goal of 80% of county adults with a post-secondary degree or credential by 2030. In order to achieve this goal, the County is focused on ensuring high school students obtain the financial assistance available to them, students who start college finish with a degree, and industry-recognized credentials are widely available.

Our Board of Education and Administration consider many factors when setting the District's 2026-27 fiscal year budget. One of the most important factors affecting the budget is the economic condition of the state of Michigan. The fiscal year 2026-27 budgets will be adopted effective July 1, 2026, and are based on estimated property tax revenues, state aid, and grant funding. State law requires the District to amend the budget if actual District resources are not sufficient to fund original appropriations. The District amends its budgets at regular intervals during the year and also maintains a five-year forecast. This robust frequent analysis ensures the financial stability of the organization and that resources are available to fulfill the mission of Oakland Schools.

### **Oakland Schools' District Budget Policy, Development Process, Management & Internal Control**

Oakland Schools' budgetary policies (3050, 3100, 3150, and 3170) direct, authorize and hold responsible the Superintendent for the planning, preparation, and execution of the District's annual operating budgets. The Board of Education authorizes and funds the operating budgets according to approved district policy, procedures and laws of the State of Michigan. The Board of Education conducts budget hearings and a budget adoption process in accordance with state law. Changes to the original annual operating budgets shall be documented to maintain accurate working budgets and shall be presented through the budget amendment process at least three (3) times each fiscal year for Board of Education review and approval.

#### **Significant Budget Policy:**

The district's significant budget policies and the complete policy citations are presented below:

#### **Policy 3050 - Budget preparation:**

The Superintendent shall be responsible for planning the District's budget. The budget shall be the numerical representations of the Board's and District's programs and operational priorities. The Superintendent shall keep the Board informed during the planning process and secure input from the Board through discussion or workshops. The Board may approve a special committee to work with the Superintendent in determining the budget priorities.

#### **Policy 3100 - Annual operating budget and amendments:**

The District's budget shall be prepared by the Superintendent and shall reflect the program and operational priorities of the District. The Superintendent shall follow the adopted budget. The Board shall fund the operating budget according to approved fiscal and budgetary procedures

adhered to and required by the State of Michigan. The Board, working with administration, shall establish priorities for the District. The budget shall contain a contingency appropriation within the General Education, Special Education, and the Vocational Education funds, to be used and transferred at the discretion of the Superintendent, for the express purpose of addressing unforeseen existing program and operational costs. The Board shall be notified of the use of such funds within the budget amendment process. In order for the District's budget preparation to proceed in an orderly fashion, the Superintendent shall establish deadlines and time schedules. The Board shall conduct hearings and budget approval in accordance with state law. Changes to the original operating annual budget shall be documented to maintain accurate working budgets. Changes shall be prepared through budget amendments at least three (3) times each fiscal year for Board review and approval. The Superintendent shall develop administrative rules to implement this policy.

**Policy 3150 – Fund balance:**

The Board realizes its responsibility under law to maintain a balanced, non-deficit, financial condition for the District. A fund balance provides flexibility in dealing with unanticipated budget emergencies such as mid-year reductions in state funding. In addition, a fund balance will help to avoid cash flow borrowing. To this end, the board will strive to maintain an appropriated and budgeted fund balance in each fund which appropriately considers known actual or estimated liabilities of each fund and the risk in the operating and state and local economic environment. The Board's goal is to maintain annual fund balances as set forth below:

1. The General Education Fund ending unassigned fund balance target shall be at least 15% of estimated operating expenditures.
2. The Career Focused Education Fund ending restricted fund balance target shall be equal to 15% of estimated operating expenditures.
3. The Special Education Fund ending restricted fund balance target shall be at least 5% of expected operating expenditures of the fund less payments (also referred to as transfers) to local school districts.
4. All other District ending fund balances shall be determined by the Superintendent who shall consider the financial environment and the associated risks to include actual or estimated liabilities.

The Board delegates to the Superintendent the authority to create assigned fund balances and to allocate amounts to such balances to be used for specific purposes. Such assignments cannot exceed the available (spendable, unrestricted, uncommitted) fund balance in any particular fund. The Superintendent is directed to bring only those budget recommendations to the Board that comply with all laws and the intent of the policy.

**Policy 3170 – Budget transfer authority:**

The Superintendent is authorized to approve adjustments and/or transfers between line items within a fund of the Board adopted operating budget. Such adjustments and/or transfers shall be reported to the Board through the amendment process. Authorization for such adjustments and/or transfers shall be included in the general appropriations act amendments. Inter-fund transfers shall not be made without prior Board of Education approval.

**Budget Development Process**

The Oakland Schools' budget development process operates on a continuous improvement basis. In order for the District's budget preparation to proceed in an orderly fashion, the Superintendent annually establishes a budget development calendar. Budget documents, as released each year, will include presentation changes and improvements. Accordingly, the proposed budget documents reflect all changes made to our general ledger reporting structure done to maintain compliance with the Michigan Public Schools Accounting Manual (Bulletin 1022). Included in our budget document are all governmental fund types, proprietary fund types, and a summary of our grant and state funded projects. The District has

fiduciary type funds which are used to account for assets held by the school district in a trustee capacity or as an agent. These funds are custodial in nature (assets equal liabilities) and do not involve the measurement of results of operations. These funds are not presented in this document as the district is not required to formally adopt a budget for these funds; however, information on the Fiduciary funds can be found in the District's most recent Annual Comprehensive Financial Report.

### **District Cost Allocation Methodologies**

During the normal course of conducting our business, Oakland Schools incurs costs that require a logical methodology to allocate between our three major operating funds: the General Education Fund (GEF), the Special Education Fund (SEF) and the Career Focused Education Fund (CFEF). The Michigan Department of Education's (MDE) "Accounting and Fiscal Reporting Requirements for Intermediate School District Use of Special Education Funds" rules identify allocation-eligible function-based costs as defined by the Michigan Department of Education's Bulletin 1022 Accounting Manual.

For the Special Education Fund, the primary controlling parameter is a 25% maximum allocation cap on each eligible function-based cost pool. The CFEF has no such limiting set of rules to date, but we treat the allocation of costs to the CFEF in the same manner as the SEF with respect to the application of our general allocation methodology process. The following function-based cost pools, as defined in the Michigan Department of Education's bulletin 1022 Accounting Manual, are eligible to be allocated:

- Truancy/Absenteeism Services – (211)
- Improvement of Instruction – (221)
- Board of Education – (231)
- Executive Administration – (232)
- Fiscal Services – (252)
- Internal Services – (257)
- Operating Building Services – (261)
- Building Security Services – (266)
- Student Transportation Services – (271)
- Planning, Research, Development and Evaluation Services – (281)
- Communication Services – (282)
- Human Resources Services – (283)
- Technology Support Services – (284)
- Pupil Accounting – (285)
- Other Central Services – (289)
- Other Support Services – (299)

Oakland Schools uses two basic cost allocation methodologies, the general allocation method and the activity based cost method. The application of the two allocation methodologies is limited to the allocation eligible function based cost pools as identified in the Special Education Fund rules referenced above and revised to reflect the most current issuance of the MDE Bulletin 1022 Accounting Manual definitions. The methodology used most by the District is the general allocation. The following is a synopsis of the general allocation methodology.

Most qualifying function-based gross budget cost pools not allocated using an activity based cost methodology are allocated 50% to the General Education Fund, 25% to the Special Education Fund and 25% to the Career Focused Education Fund with the exception of those departments that generate revenues and those for which a study has been done and another allocation method has been deemed more appropriate. For function based gross budget cost pools with departments that generate revenue (predominately Technology Services), the gross cost pool is decreased by the amount of related revenue to create a "net" budget cost pool. The remaining net budget cost pool is then subject to the general allocation

methodology (GEF 50% - SEF 25% - CFEF 25%). We reconcile budget to actual expenditures throughout the year and at year-end to ensure the costs allocated align to the appropriate percentages.

The activity based cost allocation – space utilization methodology is used for allocating capital, maintenance and operating costs associated with our facilities. The space utilization allocation methodology is predicated on square footage occupied or utilized by the District’s departments and programs. The activity based cost allocation – FTE based methodology is applied to the Financial Services, Human Resources, Office of Procurement & Contracting and the Enterprise Technical Services departments. The primary activity based cost driver of each department is the number of employees in the organization they serve therefore the allocation percentages are based on the full time equivalent employees of each fund. The activity based cost allocation – transportation miles is used for Pupil Transportation and is based on the cost of student miles transported for all constituent districts of the ISD.

The following schedules provide the fund level and departmental level allocation percentage utilized in the proposed budget.

**Fiscal Year 2027 Budget – Allocation Schedule**

Allocation Name			Fund 100	Fund 200	Fund 600
General Allocation			50%	25%	25%
Activity Based Cost Allocation - FTE based			27%	25%	48%
Activity Based Cost Allocation - Space Utilization			50%	24%	26%
Activity Based Cost Allocation - Transportation Miles			73%	25%	2%
	<b>Loc</b>	<b>Func</b>	<b>Fund 100</b>	<b>Fund 200</b>	<b>Fund 600</b>
Office of the Superintendent	001	0231/0232	50%	25%	25%
Deputy Superintendent	002	232	50%	25%	25%
Asst Supt - Finance & Operations	003	232	50%	25%	25%
LEA & Administration Support	006	232	50%	25%	25%
Financial Services	011	252	27%	25%	48%
Financial Services - Property Taxes	011	259	6%	75.50%	18.50%
Event Management Operations	013	299	50%	25%	25%
Government Relations	014	232	50%	25%	25%
Technology Services - Licensing	028	284	70%	15%	15%
Technology Services Administration	029	284	50%	25%	25%
Technology Services - Technical Support Services	030	284	50%	25%	25%
Technology Services - Application Services	032	284	50%	25%	25%
Technology Services - Enterprise Tech Services	033	284	27%	25%	48%
Legal Affairs	038	232	50%	25%	25%
Records Management	039	289	50%	25%	25%
Auxiliary Services Administration	040	0257/0289	50%	25%	25%
Facilities & Building Projects	041	0261/0266	50%	24%	26%
Office of Procurement & Contracting	042	252	27%	25%	48%
Pupil, Corporate & District Services	044	0211/0285	50%	25%	25%
Pupil Transportation	045	271	73%	25%	2%
Shipping and Receiving	047	257	50%	25%	25%
Communications Services	049	282	50%	25%	25%
Human Resources	083	283	27%	25%	48%
DSS Research, Evaluation & Assessment	086	281	50%	25%	25%
Plant & Fixed Charges - Facility Operations	091	261	50%	24%	26%

<b>Oakland Schools Allocated Departments Consolidated Fiscal Year 2027 Budget</b>	<b>Loc</b>	<b>Fund 100</b>	<b>Fund 200</b>	<b>Fund 600</b>	<b>Total</b>	<b>% of GEF, SEF, CFEF Funds</b>
<b>General Allocation</b>		50%	25%	25%	100%	%
Office of the Superintendent	001	456,900	228,300	228,300	913,500	0.30%
Deputy Superintendent	002	373,300	158,700	158,200	690,200	0.23%
Asst Supt - Finance & Operations	003	185,400	91,500	94,700	371,600	0.12%
LEA & Administration Support	006	740,900	32,800	32,800	806,500	0.26%
Event Management Operations	013	475,900	192,800	192,700	861,400	0.28%
Government Relations	014	370,200	184,400	184,900	739,500	0.24%
Technology Services Administration	029	159,900	77,700	83,200	320,800	0.11%
Technology Services - Technical Support Services	030	598,200	300,100	299,900	1,198,200	0.39%
Technology Services - Application Services	032	2,233,900	1,115,800	1,116,300	4,466,000	1.47%
Legal Affairs	038	487,100	250,900	520,300	1,258,300	0.41%
Records Management	039	14,400	7,400	7,300	29,100	0.01%
Auxiliary Services Administration	040	181,500	91,400	91,800	364,700	0.12%
Pupil, Corporate, & District Services	044	664,700	334,700	331,200	1,330,600	0.44%
Auxiliary Services - Shipping and Receiving	047	188,200	94,200	94,300	376,700	0.12%
Communications Services	049	583,400	290,700	291,600	1,165,700	0.38%
		7,713,900	3,451,400	3,727,500	14,892,800	4.89%
<b>General Allocation Net of Revenue</b>		70%	15%	15%	100%	
Technology Services - Licensing	028	2,206,000	469,900	469,900	3,145,800	1.03%
<b>Activity Based Cost Allocation - FTE based</b>		27%	25%	48%	100%	
Financial Services (Func 252)	011	507,800	469,500	901,600	1,878,900	0.62%
Technology Services - Enterprise Tech Services	033	749,400	695,700	1,333,000	2,778,100	0.91%
Office of Procurement & Contracting	042	237,400	218,700	419,000	875,100	0.29%
Human Resources	083	905,600	490,800	1,078,600	2,475,000	0.81%
		2,400,200	1,874,700	3,732,200	8,007,100	2.63%
<b>Property Tax Allocation - Millage</b>		6%	75.5%	18.5%	100%	
Financial Services - Property Taxes (Func 259)	011	51,600	656,500	160,500	868,600	0.29%
<b>Activity Based Cost - Space Usage</b>		50%	24%	26%	100%	
Facilities & Building Projects	041	275,400	133,300	142,300	551,000	0.18%
Plant & Fixed Charges - Facility Operations	091	498,500	248,300	301,800	1,048,600	0.34%
<b>Cost Based Allocation</b>		73%	25%	2%	100%	
Auxiliary Services - Pupil Transportation	045	208,300	71,500	6,300	286,100	0.09%
<b>Grand Total</b>		13,353,900	6,905,600	8,540,500	28,800,000	9.46%

### **Significant Legal Requirements**

The State of Michigan requires Intermediate School Districts to comply with the following Public Acts and Michigan Compiled Laws:

1. The General Property Tax Act - Public Act 206 of 1893 ( MCL 211.24e)
2. Uniform Budgeting and Accounting Act – Public Act 2 of 1968
3. The Revised School Code - Public Act 451 of 1976 ( MCL 380.624)
4. The Revised School Code - Public Act 451 of 1976 (MCL 380.684)

These acts require all school districts to prepare budgets for their funds, which account for the day-to-day operations of the school district; however, fiduciary funds are not required to be budgeted. The budgets are prepared in accordance with generally accepted accounting principles and a specific uniform chart of accounts established by the State of Michigan. The Michigan School Accounting Manual (Bulletin 1022) serves as a mandatory guide to the uniform classification and recording of accounting transactions for Michigan public school districts. The ISD Board, not later than May 1<sup>st</sup>, must submit its proposed budget (the general fund is required but we provide budgets for all funds) for the next school fiscal year to the board of each constituent district for review and comment.

Budgets must be approved and adopted no later than June 30 for the fiscal year beginning July 1 and ending June 30 of the subsequent year. Prior to adoption, the Board must conduct a public hearing and make the budget available for review as well as provide notice of the hearing in accordance with the law. Formal adoption of the budget is accomplished through a general appropriations resolution approved by the Board which sets forth the amounts to defray the expenditures and meet the liabilities of the school district as well as a statement of estimated revenues and a statement of estimated expenditures, by function in each fund. Once approved expenditures cannot exceed the budget by function during the fiscal year without Board approval of amendments.

### **District Budget Management and Internal Controls:**

The district maintains a system of budgetary and internal controls designed to assist management in meeting its responsibility for reporting reliable information. The system is designed to provide reasonable assurance that assets are safeguarded, and transactions are recorded correctly and executed with management's authorization. The financial software system will not allow funds to be encumbered or processed for payment that exceed the total of the budgetary control account. During the fiscal year, a quarterly financial reporting package is provided to the Board of Education. Included in the quarterly financial reporting package are "budget to actual" summary revenue and expenditure reports for all budgeted funds, cash and investment position information, check register by fund, procurement card activity report and biweekly employee expense reimbursement reports.

## **BUDGET DEVELOPMENT ASSUMPTIONS**

### **Revenue Assumptions & Proposed Budgets**

#### **Property Tax Revenues**

Property tax revenues drive the revenue budgets of Oakland Schools' General Education, Special Education and Career Focused Education Funds.

Oakland Schools' tax base is comprised of 70% principal residence and 30% non-principal residence taxable value classification property. Property taxes have been budgeted to increase by 3.4% over the prior year which is a conservative estimate based on current Oakland County Equalization projections. The

District experienced a Headlee rollback for ten of the last eleven years. Below are the property tax revenue expectations by fund for the proposed budget:

<b>Property Taxes</b>	2025-26	2026-27	\$ change	% change
General Education Fund	\$ 15,547,600	\$ 16,076,200	\$ 528,600	3.40%
Special Education Fund	197,835,800	204,562,200	6,726,400	3.40%
Career Focused Education Fund	48,379,700	50,024,600	1,644,900	3.40%
Total Property Tax Revenue	\$ 261,763,100	\$ 270,663,000	\$ 8,899,900	3.40%

### **Investment Revenues**

Oakland Schools’ investment strategy is driven by its investment policy and is supplemented with the professional skills of an investment advisory firm. We expect the individual funds’ total actual investment revenue to reflect the available cash flow resources for investment and the length of the investment. Investment revenue began improving in 2023-24 after years of weak interest rates. Investment revenues for 2025-26 are projected to decrease approximately 11% and are budgeted to decline further in 2026-27 due to future economic uncertainties:

<b>Investment Revenue</b>	2025-26	2026-27	\$ change	% change
General Education Fund	\$ 1,500,000	\$ 1,200,000	\$ (300,000)	-20.0%
Special Education Fund	3,136,700	2,509,400	(627,300)	-20.0%
Career Focused Education Fund	1,220,000	976,000	(244,000)	-20.0%
Shared Services & Tuition Programs Fund 270	185,000	148,000	(37,000)	-20.0%
ONE Fund 271	530,000	424,000	(106,000)	-20.0%
Medicaid Fund 273	450,000	360,000	(90,000)	-20.0%
HR/Finance Consortium 277	50,000	40,000	(10,000)	-20.0%
Debt Service Funds	419,000	1,206,000	787,000	187.8%
Capital Project Funds	1,280,000	1,024,000	(256,000)	-20.0%
Production Print Enterprise Fund	7,800	6,000	(1,800)	-23.1%
Total Investment Revenue	\$ 8,778,500	\$ 7,893,400	\$ (885,100)	-10.1%

### **Other Local Revenue**

District wide, Other Local Revenue is projected to remain relatively flat in most funds, increasing by 4.0% in 2026-27. Significant changes include:

- decrease in total payments related to the Community Telecommunications Network due to an additional CTN distribution which occurred in 2025-26
- CFEF miscellaneous revenue is projected to decrease due to the receipt of public surplus auction revenue in 2025-26
- Net VLAC and ACE tuition revenue is projected to increase year to year due to refunds issued in 2025-26 in accordance with the District’s fund balance protocol
- Foreign Exchange Program revenue is projected to increase due to expected increased participation
- decrease in E-rate revenue in the ONE Fund due to a reduction in projects which qualify for the refund

The schedules below depict the changes by fund.

<b>GEF local revenue</b>	2025-26	2026-27	\$ change	% change
Auxiliary Services-Rebates	\$ 40,000	\$ 40,000	\$ -	0.0%
Central Applicant Tracking	167,200	175,500	8,300	5.0%
Community Television Network (CTN)	750,000	600,000	(150,000)	-20.0%
Conference Center - Catering Revenue	28,500	28,500	-	0.0%
Cooperative Programs	173,000	173,000	-	0.0%
District & School Services - Discovery/Learn 360	238,900	212,000	(26,900)	-11.3%
District & School Services - Illuminate	537,000	536,300	(700)	-0.1%
District & School Services - Rubicon West	85,500	82,000	(3,500)	-4.1%
Miscellaneous and Other	58,000	56,500	(1,500)	-2.6%
MOOR Coop Fees	85,200	85,200	-	0.0%
Rental Fees	36,100	36,100	-	0.0%
Technology Services - Student Application	612,000	614,700	2,700	0.4%
Technology Services - Virtual Server Area Storage	127,700	127,700	-	0.0%
Workshop fees	350,000	350,000	-	0.0%
<b>Total GEF Other Local Revenue</b>	<b>\$ 3,289,100</b>	<b>\$ 3,117,500</b>	<b>\$ (171,600)</b>	<b>-5.2%</b>

<b>SEF Local Revenue</b>	2025-26	2026-27	\$ change	% change
Professional development workshop fees	\$ 50,000	\$ 50,000	\$ -	0.0%
Miscellaneous & other	20,000	20,000	-	0.0%
<b>Total SEF Other Local Revenue</b>	<b>\$ 70,000</b>	<b>\$ 70,000</b>	<b>\$ -</b>	<b>0.0%</b>

<b>CFEF Local Revenue</b>	2025-26	2026-27	\$ change	% change
Early college tuition	\$ 445,000	\$ 445,000	\$ -	0.0%
Miscellaneous revenue	66,500	26,500	(40,000)	-60.2%
Program revenue	68,800	68,800	-	0.0%
<b>Total CFEF Other Local Revenue</b>	<b>\$ 580,300</b>	<b>\$ 540,300</b>	<b>\$ (40,000)</b>	<b>-6.9%</b>

<b>Special Revenue Funds</b>	2025-26	2026-27	\$ change	% change
Shared Services	\$ 11,403,900	\$ 11,992,300	\$ 588,400	5.2%
VLAC Program - Tuition	3,078,600	3,666,500	587,900	19.1%
ACE Tuition	1,218,300	1,470,000	251,700	20.7%
Graduation Alliance	1,400,000	1,400,000	-	0.0%
Foreign Exchange Program	108,000	180,000	72,000	66.7%
ONE Fund - capital outlay fees	523,800	523,800	-	0.0%
ONE Fund - Erate discount revenue	400,000	100,000	(300,000)	-75.0%
Medicaid Fund	17,837,900	18,495,100	657,200	3.7%
HR/Finance Consortium Fees	1,161,000	1,183,700	22,700	2.0%
School Activities Fund	180,000	180,000	-	0.0%
<b>Total Special Revenue Fund Local Revenue</b>	<b>\$ 37,311,500</b>	<b>\$ 39,191,400</b>	<b>\$ 1,879,900</b>	<b>5.0%</b>

<b>PPEF Local Revenue</b>	2025-26	2026-27	\$ change	% change
Production printing - external services	\$ 350,000	\$ 350,000	\$ -	0.0%
Production printing - internal services	430,000	430,000	-	0.0%
Fingerprinting & miscellaneous revenue	65,000	65,000	-	0.0%
<b>Total PPEF Other Local Revenue</b>	<b>\$ 845,000</b>	<b>\$ 845,000</b>	<b>\$ -</b>	<b>0.0%</b>

	2025-26	2026-27	\$ change	% change
<b>Grand Total - other local revenue</b>	<b>\$ 42,095,900</b>	<b>\$ 43,764,200</b>	<b>\$ 1,668,300</b>	<b>4.0%</b>

### **State Source Revenue**

The majority of State Revenue is projected to stay flat across all funds for 2026-27, with some exceptions:

- Sec 81 ISD Operations revenue is budgeted to increase by 2.0%.
- Sec 147c(1) MPSERS UAAL Rate Stabilization revenue is budgeted to decrease but has a corresponding expenditure decrease as these funds are passed through to the Office of Retirement Services.
- Section 27L(4) Healthcare Offset revenue is projected to be one-time funding in 2025-26 and has been removed from the 2026-27 budget.
- Section 147a(2) MPSERS Normal Cost Offset revenue contained a one-time adjustment in 2025-26 that is not included in the 2026-27 budget, causing a reduction in that categorical.

The chart below identifies in dollars, by fund, the expectations contained in this budget document:

<b>State Source Revenue</b>	2025-26	2026-27	\$ change	% change
General Education Fund	\$ 7,617,100	\$ 7,509,100	\$ (108,000)	-1.4%
Special Education Fund	9,431,500	9,168,300	(263,200)	-2.8%
Career Focused Education Fund	6,560,900	6,343,200	(217,700)	-3.3%
Shared Services - MPSERS Section 147	1,763,700	1,578,200	(185,500)	-10.5%
Medicaid - MPSERS MPSERS Section 147	72,400	61,200	(11,200)	-15.5%
HR/FIN - MPSERS MPSERS Section 147	97,200	95,500	(1,700)	-1.7%
PPEF - MPSERS MPSERS Section 147	56,200	56,300	100	0.2%
Total State Source Revenue	\$ 25,599,000	\$ 24,811,800	\$ (787,200)	-3.1%

**Other Financing Sources - Indirect Revenue**

Oakland Schools’ other financing sources - indirect revenue for the proposed fiscal year budget is associated with our grant management program and shared services engagements and are identified by fund below. Revenue budgets are based on current estimates of grant funding and intergovernmental agreements and are adjusted via the budget amendment process throughout the year as grant funds are expended.

<b>Indirect Revenue</b>	2025-26	2026-27	\$ change	% change
General Education Fund	\$ 326,300	\$ 326,300	\$ -	0.0%
Special Education Fund	250,000	250,000	-	0.0%
Career Focused Education Fund	13,000	13,000	-	0.0%
Shared Services & Tuition Programs	538,400	552,000	13,600	2.5%
Total Other Financing Sources Revenue	\$ 1,127,700	\$ 1,141,300	\$ 13,600	1.2%

**Other Financing Sources**

Oakland Schools’ other financing source revenues are presented in the table below. Most revenue lines in this category are for interfund operating transfers. Operating transfers are made based on the availability of funds in any given year and current and anticipated needs of the District. Also included in Debt Service Funds is the interest subsidy received from the federal government for the Qualified School Construction Bonds (QSCB). Operating transfers show a significant decrease in 2026-27 as additional funds were available in 2025-26 to transfer for current and future capital projects. Additionally, transfers to the QSCB bonds that will become due in 2027 are reduced in 2026-27.

<b>Other Financing Sources Net of Indirect Revenue</b>	2025-26	2026-27	\$ change	% change
General Education Fund	\$ 396,200	\$ 406,000	\$ 9,800	2.5%
Career Focused Education Fund	1,025,000	25,000	(1,000,000)	-97.6%
ONE Fund	426,600	426,600	-	0.0%
HR/Finance Consortium	50,000	50,000	-	0.0%
Debt Service Funds	4,832,700	4,536,300	(296,400)	-6.1%
Capital Project Funds	10,500,000	9,200,000	(1,300,000)	-12.4%
Total Other Financing Sources Revenue	\$ 17,230,500	\$ 14,643,900	\$ (2,586,600)	-15.0%

**Grant Award Funding**

Oakland Schools grant award funding includes formally awarded federal, state, and local grants plus Michigan Department of Education state aid funded projects. The “Other Financing Sources - Indirect Revenue” generated from the management of our grant program is assigned to the General Education, Special Education, and Career Focused Education Funds. The following schedule presents year-to-year new grant award and carryover award funding expectations and comparisons. Funding amounts as presented for fiscal year 2026-27 are estimates at the time of the writing of this document, therefore the actual award amounts will vary. Oakland Schools budgets grant revenue and expenditures based on the entire award; actual expenditures and reimbursements may be lower than awarded amounts. The proposed budget contains a 1.1% increase in grant revenues and expenditures due to anticipated growth of early childhood programs and the amount of carryover funds expected.

<b>Grant Revenue</b>	2025-26	2026-27	\$ change	% change
Local Source Revenue	\$ 2,910,000	\$ 1,866,600	\$ (1,043,400)	-35.9%
State Source Revenue	132,265,000	136,389,300	4,124,300	3.1%
Federal Source Revenue	62,826,000	61,993,900	(832,100)	-1.3%
Total Grant Revenue	\$ 198,001,000	\$ 200,249,800	\$ 2,248,800	1.1%
<b>Grant Expenditures and Other</b>				
	2025-26	2026-27	\$ change	% change
Instruction	\$ 491,700	\$ 423,500	\$ (68,200)	-13.9%
Support Services:				
Pupil	7,322,400	7,205,200	(117,200)	-1.6%
Instructional Staff	15,028,200	17,908,300	2,880,100	19.2%
General Administration	70,000	36,900	(33,100)	-47.3%
Business Services	145,300	117,500	(27,800)	-19.1%
Operations & Maintenance	170,200	20,300	(149,900)	-88.1%
Pupil Transportation Services	2,845,500	2,523,000	(322,500)	-11.3%
Central Services	4,334,300	5,744,900	1,410,600	32.5%
Other Services	10,000	-	(10,000)	-100.0%
Community Services	3,390,900	3,341,200	(49,700)	-1.5%
Interdistrict Transfers and Other	164,192,500	162,929,000	(1,263,500)	-0.8%
Total expenditures and other	\$ 198,001,000	\$ 200,249,800	\$ 2,248,800	1.1%

**Expenditure Assumptions & Proposed Budgets**

**Staffing Changes**

The schedule represented below provides a snapshot of staffing as of March 2026 and changes incorporated into our fiscal year 2026-27 budgets. The resulting staff adjustments, if any, are intended to better meet our service priorities and manage our operating costs.

<b>Summary Staffing Report (as of 3/10/26)</b>			
	<b>FTE</b>	<b>FTE</b>	
<b>Business &amp; Operations Departments</b>	<b>2025-26</b>	<b>2026-27</b>	<b>Change</b>
Administration	6.0	6.0	0.0
Auxiliary Services	8.0	8.0	0.0
Communication Services	7.0	7.0	0.0
Event Management	6.0	6.0	0.0
Financial Services	18.3	18.3	0.0
Human Resources	12.0	11.0	-1.0
Legal Affairs	5.0	5.0	0.0
Medicaid	4.0	4.0	0.0
Purchasing	6.0	6.0	0.0
Business Office & HR Residency Programs	4.7	4.2	-0.5
Shipping/Receiving	2.0	3.0	1.0
Transportation	2.0	2.0	0.0
<b>Subtotal:</b>	<b>81.0</b>	<b>80.5</b>	<b>-0.5</b>
<b>Programs &amp; Services Departments</b>	<b>FTE</b>	<b>FTE</b>	<b>Change</b>
<b>2025-26</b>	<b>2026-27</b>		
Student Services (Technical Campuses)	159.5	159.5	0.0
Child Nutrition	1.3	1.3	0.0
District & School Services & Pupil Services	96.1	95.8	-0.3
Gov't Relations	2.7	2.7	0.0
Special Populations	83.7	89.7	6.0
Student Services	21.3	21.3	0.0
Technology Services	61.3	63.3	2.0
<b>Subtotal:</b>	<b>425.9</b>	<b>433.5</b>	<b>7.7</b>
<b>Other Programs &amp; Services</b>	<b>FTE</b>	<b>FTE</b>	<b>Change</b>
<b>2025-26</b>	<b>2026-27</b>		
Accelerated Early College (ACE)	2.1	2.1	0.0
Shared & Field Services / MiPEER	112.5	112.5	0.0
Virtual Learning Academy Consortium (VLAC)	17.2	17.2	0.0
Production Print & Graphics	4.3	4.3	0.0
<b>Subtotal:</b>	<b>136.1</b>	<b>136.1</b>	<b>0.0</b>
<b>Total Across All Departments:</b>	<b>642.9</b>	<b>650.1</b>	<b>7.2</b>

### **Salaries, Wages and Mandatory Benefits**

Salaries, wages and mandatory benefits comprise the second largest expenditure category for Oakland Schools behind transfers to local districts (Other Financing Uses). Mandatory benefits are defined as employer FICA and employer Michigan Public School Employee Retirement System funding.

There is an across-the-board salary increase in the 2026-27 budget of 2.0% for all Oakland Schools staff. All union salary changes are subject to collective bargaining. The current collective bargaining agreement expires June 30, 2027. The growth rate assumption applied to the existing non-union salary/wage base for step increases in the three major funds for fiscal year 2026-27 is 1.3%. The union wage base will experience step increases resulting in a wage base cost growth rate estimated at .9%. As a cost efficiency measure, and

to continue to provide certain services, the district utilizes part time employees and contractors to provide certain services when possible.

The schedule below illustrates the salary and wage plus FICA (social security plus Medicare) changes by fund. All FY 2026-27 positions are assumed to be filled and fully funded for the entire year, whereas the FY 2025-26 budget takes current vacancies into consideration at the time of the 2<sup>nd</sup> budget amendment. All budget figures listed below are presented net of grant funded expenditures:

<b>Salaries &amp; Wages w/FICA</b>	2025-26	2026-27	\$ change	% change
General Education Fund	\$ 11,828,500	\$ 12,601,700	\$ 773,200	6.5%
Special Education Fund	12,607,700	13,674,300	1,066,600	8.5%
Career Focused Education Fund	20,079,000	20,450,900	371,900	1.9%
Shared Services & Tuition Programs	10,207,200	10,341,200	134,000	1.3%
Medicaid Fund	372,500	366,200	(6,300)	-1.7%
HR/Finance Consortium	600,700	624,200	23,500	3.9%
Production Print Enterprise Fund	310,900	321,500	10,600	3.4%
Total Salary & Wages w/FICA	\$ 56,006,500	\$ 58,380,000	\$ 2,373,500	4.2%

**MPERS Retirement Costs**

The district will pay, for most employees, an additional \$28.10 in retirement costs for every \$100 of wages it pays to our employees in fiscal year 2026-27. Since employees may participate in one of eight different plans, the District calculates a blended retirement rate based on plan participation. The blended retirement rate expectation for fiscal year 2026-27 is 26.53%. Please see the chart below for fund level budget information. All budget figures listed below are presented net of grant funded expenditures:

<b>MPERS Retirement Costs</b>	2025-26	2026-27	\$ change	% change
General Education Fund	\$ 4,658,600	\$ 4,566,600	\$ (92,000)	-2.0%
Special Education Fund	5,000,000	5,023,600	23,600	0.5%
Career Focused Education Fund	7,786,400	7,475,200	(311,200)	-4.0%
Shared Services & Tuition Programs	3,678,800	3,503,500	(175,300)	-4.8%
Medicaid Fund	151,400	136,800	(14,600)	-9.6%
HR/Finance Consortium	242,200	229,300	(12,900)	-5.3%
Production Print Enterprise Fund	119,400	114,200	(5,200)	-4.4%
Total MPERS Retirement Costs	\$ 21,636,800	\$ 21,049,200	\$ (587,600)	-2.7%

**Healthcare Insurance**

The “hard cap” on the dollar limits the district may pay due to legislative mandates and district implementation choice are adjusted annually on January 1. Collective bargaining may impact the current plans and the cost sharing arrangement that is projected in the proposed budget.

Employees are required to pay any and all costs of their individual plan choice that exceed these limits. According to the medical plans currently in place, it is expected that employees will contribute approximately 17% on average toward the cost of their health insurance, under the hard cap scenario. Future increases to the employer hard cap limits are subject to the medical consumer price index, over which the district has no jurisdiction.

<b>Healthcare Insurance</b>	2025-26	2026-27	\$ change	% change
General Education Fund	\$ 1,213,800	\$ 1,338,600	\$ 124,800	10.3%
Special Education Fund	1,478,500	1,646,100	167,600	11.3%
Career Focused Education Fund	2,361,400	2,657,100	295,700	12.5%
Shared Services & Tuition Programs	1,177,800	1,106,500	(71,300)	-6.1%
Medicaid Fund	64,200	65,000	800	1.2%
HR/Finance Consortium	34,300	34,800	500	1.5%
Production Print Enterprise Fund	77,600	78,400	800	1.0%
Total Healthcare Insurance Costs	\$ 6,407,600	\$ 6,926,500	\$ 518,900	8.1%

**Other Benefit Costs**

Other benefit costs include the following benefits, both self-insured and premium-based insured programs:

- Premium-based dental, vision, life, short- and long-term disability insurance benefit programs
- Workers compensation as a member of the SET-SEG Self-Insurers Workers’ Compensation Fund pool
- Cash in lieu benefits to those opting out of employer-provided health insurance
- Miscellaneous benefits including career assistance/tuition reimbursement, unemployment and vacation sale.

The budgeted expenditures as presented do not include any one-time charges. The District is expecting a net increase of 7.5% for dental and 2% for life and disability programs. Budget increases are included for workers compensation insurance based on a slight increase in our experience modification combined with rate increases. Nominal changes to other insurance budgets are expected in 2026-27. Please see the chart below for fund level budget information. All budget figures listed below are presented net of grant funded expenditures and assume full staffing:

<b>Other Benefits</b>	2025-26	2026-27	\$ change	% change
General Education Fund	\$ 426,700	\$ 491,900	\$ 65,200	15.3%
Special Education Fund	443,600	500,300	56,700	12.8%
Career Focused Education Fund	803,400	924,900	121,500	15.1%
Shared Services & Tuition Programs	411,300	463,600	52,300	12.7%
Medicaid Fund	9,400	10,000	600	6.4%
HR/Finance Consortium	21,700	26,900	5,200	24.0%
Production Print Enterprise Fund	11,200	11,700	500	4.5%
Total Other Insurances	\$ 2,127,300	\$ 2,429,300	\$ 302,000	14.2%

**Purchased Services/Supplies/Other Expenditures**

Oakland Schools’ goal is to manage the purchased services, supplies, and other expenditure budgets relative to the prior year through improved material and cost management practices and cooperative purchasing programs. Included in the proposed budgets for the General Education Fund, Special Education Fund and Career Focused Education Fund in the dues & fees line items are the property tax abatement expenditure budgets. The schedule below highlights fund comparative purchased services, materials and dues & fees budgets including utilities. Expenditure budgets in the General Education Fund in 2026-27 contain a shift in budgets for Artificial Intelligence from purchased services to the addition of 2.0 FTE as aforementioned in this executive summary, which is the primary driver for those budgets decreasing in 2026-27 by 4.5%. Professional services budgets in the capital projects funds are projected to decrease as the demand for services was higher in 2025-26 when the campus renovations projects were in their early stages. We will carefully monitor budgets and adjust them as necessary through the amendment process.

<b>Purchased Services/Supplies/Other</b>	2025-26	2026-27	\$ change	% change
General Education Fund	\$ 7,098,100	\$ 6,779,000	\$ (319,100)	-4.5%
Special Education Fund	4,022,200	4,127,000	104,800	2.6%
Career Focused Education Fund	8,412,800	8,441,400	28,600	0.3%
Shared Services & Tuition Programs	4,883,000	5,036,900	153,900	3.2%
ONE Fund	1,686,400	1,648,100	(38,300)	-2.3%
Medicaid Fund	137,900	146,500	8,600	6.2%
HR/Finance Consortium	266,400	243,600	(22,800)	-8.6%
School Activities Fund	180,000	180,000	-	0.0%
Debt Service Funds	6,500	6,500	-	0.0%
Capital Projects Funds	179,000	142,900	(36,100)	-20.2%
Production Print Enterprise Fund	429,000	468,000	39,000	9.1%
Total Combined Budgets	\$ 27,301,300	\$ 27,219,900	\$ (81,400)	-0.3%

### **Capital Expenditures**

The chart below depicts the planned capital outlay expenditures for all funds including the Capital Project Funds for the new fiscal year. Capital projects can vary significantly from year to year based on a needs assessment and the timing of furniture and equipment replacement. Amounts budgeted agree to the Board-approved 5-Year Capital Outlay Plan. Budget increases in the Special Education, Medicaid and Production Print Enterprise Funds are due to technology capital needs at the leased building housing those activities. Decreases in ONE Fund capital budgets are for the countywide fiber infrastructure project that will be completed in 2025-26.

<b>Capital Expenditures</b>	2025-26	2026-27	\$ change	% change
General Education Fund	\$ 892,400	\$ 936,100	\$ 43,700	4.9%
Special Education Fund	394,300	678,500	284,200	72.1%
Career Focused Education Fund	248,600	245,600	(3,000)	-1.2%
Shared Services & Tuition Programs	300,200	260,000	(40,200)	-13.4%
ONE Fund	1,229,300	35,000	(1,194,300)	-97.2%
Medicaid Fund	4,100	35,600	31,500	768.3%
Capital Projects Funds	21,733,200	21,626,300	(106,900)	-0.5%
Production Print Enterprise Fund	19,800	66,700	46,900	236.9%
Total Capital Outlay Budgets	\$ 24,821,900	\$ 23,883,800	\$ (938,100)	-3.8%

### **Other Financing Uses**

The chart below depicts outgoing transfers and other transactions not classified elsewhere. The General Education Fund other financing uses consist of substitute reimbursements to districts, funding for collaborative projects such as Literacy Essentials Oakland (LEO), along with operating transfers to fund capital projects and Oakland Schools' fees to the ONE Fund and HR/Finance Consortium. In 2025-26, the General Education Fund budget contains an additional \$1.0 million transfer to the Career Focused Education Fund to be used for the STEMi lease and operations. Special Education Fund budgets in this category consist primarily of the PA-18 base distribution, group home, extraordinary, startup and Section 24 (adjudicated youth) budgets, along with an operating transfer to fund capital projects. Career Focused Education Fund expenditure budgets are primarily to districts for transportation reimbursement and to reimburse districts for staffing and other costs of operating a Career and Technical Education program (regional allocation), along with debt service and capital projects related to the four technical campuses and administration building. Transfers from CFE to the Campus Renovations Capital Projects Fund were higher in 2025-26 as more funding was available for the aforementioned renovation projects. The Shared Services & Tuition Programs budgets contain payments to local districts for the foreign exchange program. In 2026-27, the District is increasing the payments to LEA's from \$4,000 per student to \$5,000 per student for participating in the program. This increase, combined with an anticipated increase in students and mini-

grant opportunities for participating districts results in an increased budget in this fund. Debt service fund transfers are expected to decrease in 2026-27 due to the payoff of the Qualified School Construction Bonds.

<b>Other Financing Uses</b>	2025-26	2026-27	\$ change	% change
General Education Fund	\$ 1,700,000	\$ 700,000	\$ (1,000,000)	-58.8%
Special Education Fund	193,068,600	195,847,000	2,778,400	1.4%
Career Focused Education Fund	18,636,300	17,344,300	(1,292,000)	-6.9%
Shared Services & Tuition Programs	421,200	556,000	134,800	32.0%
ONE Fund	148,000	148,000	-	0.0%
Medicaid Fund	17,620,800	18,156,200	535,400	3.0%
HR/Finance Consortium	138,400	141,800	3,400	2.5%
Debt Service Funds	770,000	473,600	(296,400)	-38.5%
Production Print Enterprise Fund	26,700	28,000	1,300	4.9%
<b>Total Other Financing Uses</b>	<b>\$ 232,530,000</b>	<b>\$ 233,394,900</b>	<b>\$ 864,900</b>	<b>0.4%</b>

**Debt Service Expenditures**

Included in this budget document are the individual budgets for all three of our Debt Service funds. Principal payments in 2026-27 reflect the maturity of the Qualified School Construction Bonds in May 2027, totaling \$14.8 million. For additional debt service details, please reference the specific fund budget documents. At the time of the printing of this document, the District is in the process of doing a partial refunding of the 2016 Refunding Bonds. As it is too early to budget for the impact of the refunding, the budgets will be amended in the first budget amendment of 2026-27, after the refunding is complete. Below are the combined debt service budgeted expenditures:

<b>Debt Service expenditures</b>	2025-26	2026-27	\$ change	% change
Debt Service - Principal redemption	\$ 1,610,000	\$ 16,490,000	\$ 14,880,000	924.2%
Debt Service - Interest	1,777,200	1,696,700	(80,500)	-4.5%
<b>Total Debt Service Expenditures</b>	<b>\$ 3,387,200</b>	<b>\$ 18,186,700</b>	<b>\$ 14,799,500</b>	<b>436.9%</b>

## Fund Equity Assumptions

The fund equity schedules below highlight our budgeted ending fund equity assumptions by major fund and reserve designation.

<b>GEF Fund Balance Information</b>	2025-26	2026-27	\$ change
Non-spendable - prepaids	\$ 66,400	\$ 66,400	\$ -
Assigned	11,233,100	12,407,300	1,174,200
Unassigned	4,134,700	4,181,700	47,000
Total Budgeted Ending Fund Balance	\$ 15,434,200	\$ 16,655,400	\$ 1,221,200
Unassigned Fund Balance as % of Budgeted Expenditures	15%	15%	
<b>SEF Fund Balance Information</b>			
	2025-26	2026-27	\$ change
Non-spendable - prepaids	\$ 39,200	\$ 39,200	\$ -
Restricted for future center facility renovations	20,943,200	15,934,100	(5,009,100)
Restricted - Special Education Fund	1,167,200	1,239,400	72,200
Total Budgeted Ending Fund Balance	\$ 22,149,600	\$ 17,212,700	\$ (4,936,900)
Restricted Fund Balance as % of Budgeted Expenditures	5%	5%	
<b>CFEF Fund Balance Information</b>			
	2025-26	2026-27	\$ change
Non-spendable - Prepaids, Inventory, etc.	\$ 43,000	\$ 43,000	\$ -
Restricted - Career Focused Education	7,946,600	8,329,300	382,700
Total Budgeted Ending Fund Balance	\$ 7,989,600	\$ 8,372,300	\$ 382,700
Restricted Fund Balance as % of Budgeted Expenditures	14%	14%	

*In accordance with state and federal law, Oakland Schools does not discriminate, nor permit discrimination, on the basis of race, color, national origin, ethnicity, religion, sex, pregnancy or parental status, gender identity, gender expression, sexual orientation, disability, age, height, weight, marital status, military service, veteran status, genetic information, or any other legally protected status, in its educational programs and activities, employment, or enrollment. The District also provides equal access to the Boy Scouts and other designated youth groups.*

*For questions or complaints regarding unlawful discrimination or harassment, employees should contact the Assistant Superintendent of Human Resources, Personnel Management and Labor Relations at (248) 209-2429 or [HR@oakland.k12.mi.us](mailto:HR@oakland.k12.mi.us). Students and others should contact the Civil Rights/Title IX Coordinator at (248) 209-2590 or [Laura.Richards-Farwell@oakland.k12.mi.us](mailto:Laura.Richards-Farwell@oakland.k12.mi.us).*



# **General Education Fund Original Budget and Five-Year Forecast**

Fiscal Year 2026-27

## GENERAL EDUCATION FUND SPECIFIC ANALYSIS

### FUND OVERVIEW

The Oakland Schools General Education Fund is projected to end FY 2026-27 with an unassigned year-end fund balance (at the time of this printing) of \$4,181,700. In 2025-26 and 2026-27, the Superintendent, in accordance with the District’s fund balance policy, assigned a portion of fund balance for certain planned projects to be completed in the subsequent fiscal year. Anticipated ending fund balances for FY 2025-26 and 2026-27 are detailed in the schedules below:

	FY 2025-26 Amend 2 Budget	FY 2026-27 Budget
Non-Spendable - Prepaids	\$ 66,400	\$ 66,400
Assigned	11,233,100	12,407,300
Unassigned	4,134,700	4,181,700
<b>Total Budgeted Ending Fund Balance</b>	<b>\$ 15,434,200</b>	<b>\$ 16,655,400</b>

FY 2026-27 revenues are projected to be \$28.6 million:

- Property taxes - \$16.1 million (56% of total revenue)
- Other local revenues - \$4.3 million
- State Source revenues - \$7.5 million
- Other Financing Source revenues - \$.7 million

FY 2026-27 expenditures are projected to be \$27.4 million:

- General Administration - \$3.4 million
- Finance and Operations - \$10.8 million
- Instructional Programs and Services - \$10.9 million
- Plant and Fixed charges - \$2.3 million

The proposed FY 2026-27 General Education Fund budget contains an operating surplus of \$1,221,200.

### Revenue

The below represent significant assumptions and items of interest in the 2026-27 revenue budgets:

- Property taxes have been budgeted to increase by 3.4% based on our projections and supported by those of the Oakland County Equalization Division.
- Interest revenue is projected to decrease due to the uncertain economic forecast.
- Oakland Schools continues to offer a subsidy for a student assessment and data analysis system, called Illuminate DnA at 50% of the base product cost. Add-ons above the base product requested by districts are at the districts’ cost. Other instructional tools such as Atlas-Rubicon and Learn360 continue to be provided to LEA’s at a fraction of their cost. The revenue for these products represents the LEA portion of the cost of those tools.
- State source revenue is held flat for FY 2026-27 pending a new state aid budget, apart from Section 81 ISD Operations revenue which is budgeted to increase 2.0% and MPSERS categorical revenue. The District has adjusted the various MPSERS categoricals based on the most recent information available at the time of printing of this document.
- Other Financing Source revenues, which consist of indirect revenue on grants, are projected to remain constant in 2026-27 with just minor increases. Indirect revenue is directly correlated to direct grant spending and fluctuates annually based on the timing of expenditures.

## **Expenditures**

The below represent significant assumptions and items of interest in the 2026-27 expenditure budgets:

- Salary and benefit budgets were forecasted in fiscal year 2026-27 to reflect a 2.0% across-the-board salary increase, plus step increases for staff not on the top step of their respective salary schedule. Budgets for 2026-27 assume all staff positions are filled for the entire fiscal year with no vacancies, whereas 2025-26 budgets have been adjusted for unfilled positions and vacancies through March 2026.
- Staffing changes contained in the General Education Fund budget include:
  - (.27) FTE reduction – HR Manager
  - (.50) FTE reduction – Business Office Residency Program
  - (.30) FTE reduction – District & School Services part-time staff
  - .50 FTE increase – Warehouse Supervisor
  - 2.0 FTE increase - Artificial Intelligence, representing a shift in funding from purchased services; no overall increase
- The 2026-27 General Education Fund budget includes a shift in funding some of our Early Childhood staff that were previously funded by grants due to the loss of Great Start Collaborative funding. These staff allocations will be re-evaluated with the release of the state's 2026-27 budget.
- Property tax abatements reflect a budget of .25% of the property tax revenue budget to address the Michigan Tax Tribunal unsettled claims.

Additional variances are included on the footnote pages.

## **FIVE-YEAR FORECAST OVERVIEW**

Following the General Education Fund (GEF) budget is the GEF five-year operating forecast model. Significant assumptions utilized in the model are identified below:

### **Revenue**

- Property tax revenues drive the revenue budget. Oakland Schools' property tax collection rate has been historically very high and stable. Oakland Schools utilizes projections obtained from Oakland County Equalization to create our taxable value forecasts. Based on the expectation of growth of the real-estate market, offset by the possibility of a Headlee rollback, property taxes are forecasted to increase by the following percentages:
  - 2027-28 2.7%
  - 2028-29 through 2031-32 2.6%
- The investment revenue forecast model uses a formula to generate the expected revenue figures for each fiscal year period based on projected cash flows and expected rate of return. The factors relied upon in this forecast for a reduction in investment income are based on economic uncertainty and the potential for another recession. All investments are managed within the district's investment policy and state law. The current state of economic affairs as of March 2026 makes investment income uncertain. The District will continue to monitor investment returns and modify forecasts as deemed necessary on an ongoing basis.
- Fee-based service revenues are budgeted at 1.5 million for 2026-27 and are expected to remain stable through the duration of the forecast.

- Technology application fees are budgeted at \$.7 million for 2026-27 and are expected to remain flat through 2032.
- State source revenues of \$7.5 million in 2026-27 for the General Education Fund are comprised primarily of Section 81 funds and Section 147 MPSERS revenue. Section 81 funds are projected to remain flat for the duration of the five-year forecast model. MPSERS 147c(1) revenues within State Revenues are projected to increase correspondingly to the expenditure increase for the same item, as 147c(1) is revenue/expenditure neutral. The final significant component of state source revenues is State Payment in Lieu of Taxes which represents reimbursement to the organization for personal property tax losses by the Local Community Stabilization Authority.
- Other Financing Sources consist of the indirect revenues associated with our grant management responsibilities and charges to Medicaid, tuition programs and the Print Production Enterprise Fund. This line item may fluctuate based on anticipated grant awards but is projected as flat in the forecast.

**Expenditures**

- Oakland Schools’ non-union personnel salary and wage cycle is fiscal year based with regards to step movement and salary schedule increases. The forecast includes a salary/growth rate of 1.3%, which would be indicative of step movement from year to year. The forecast includes a 2% base salary increase for every year of the forecast.
- The FICA rate is 7.65%. This rate is multiplied by the wage base (social security rate of 6.2% applied to individuals wages up to \$184,500 for calendar year 2026) to produce the FICA costs for the year.
- There are 8 different retirement rates for school district employees, based on their hire date and/or their personal choice for retirement benefits.

The rates that are effective from October 1, 2025 through September 30, 2026 are:

	Basic/MIP with Premium Subsidy	Pension Plus with Premium Subsidy	Pension Plus PHF	Pension Plus to DC with PHF	Basic/MIP to DC with Premium Subsidy	Basic/MIP to DC with PHF	Basic/MIP with PHF	Pension Plus 2
Rate Chgd on Reported Payroll	29.91%	25.17%	21.34%	15.21%	19.04%	15.21%	26.08%	21.41%
MPSERS UAAL Stabilization Rate	15.02%	15.02%	15.02%	15.02%	15.02%	15.02%	15.02%	15.02%
Subtotal	44.93%	40.19%	36.36%	30.23%	34.06%	30.23%	41.10%	36.43%
DC Employer Mandatory	0.00%	0.00%	0.00%	4.00%	4.00%	4.00%	0.00%	0.00%
DC Employer Match	0.00%	1.00%	1.00%	3.00%	3.00%	3.00%	0.00%	1.00%
Personal Healthcare Fund (PHF)	0.00%	0.00%	2.00%	2.00%	0.00%	2.00%	2.00%	2.00%
<b>Total Rate Charged</b>	<b>44.93%</b>	<b>41.19%</b>	<b>39.36%</b>	<b>39.23%</b>	<b>41.06%</b>	<b>39.23%</b>	<b>43.10%</b>	<b>39.43%</b>

The forecasted rates for October 1, 2026 through September 30, 2027 contained in the Governor’s proposed FY27 budget are:

	Basic/MIP with Premium Subsidy	Pension Plus with Premium Subsidy	Pension Plus PHF	Pension Plus to DC with PHF	Basic/MIP to DC with Premium Subsidy	Basic/MIP to DC with PHF	Basic/MIP with PHF	Pension Plus 2
Rate Chgd on Reported Payroll	27.51%	22.77%	21.34%	15.21%	16.64%	15.21%	26.08%	21.41%
MPSERS UAAL Stabilization Rate	13.51%	13.51%	13.51%	13.51%	13.51%	13.51%	13.51%	13.51%
Subtotal	41.02%	36.28%	34.85%	28.72%	30.15%	28.72%	39.59%	34.92%
DC Employer Mandatory	0.00%	0.00%	0.00%	4.00%	4.00%	4.00%	0.00%	0.00%
DC Employer Match	0.00%	1.00%	1.00%	3.00%	3.00%	3.00%	0.00%	1.00%
Personal Healthcare Fund (PHF)	0.00%	0.00%	2.00%	2.00%	0.00%	2.00%	2.00%	2.00%
<b>Total Rate Charged</b>	<b>41.02%</b>	<b>37.28%</b>	<b>37.85%</b>	<b>37.72%</b>	<b>37.15%</b>	<b>37.72%</b>	<b>41.59%</b>	<b>37.92%</b>

In order to project a budgeted rate overall for Oakland Schools for 2026-27, an analysis of how many employees we have on each of these plans was studied. A blended rate, exclusive of UAAL, for budgeting retirement costs for 2026-27 has been established at 26.53%. The blended rate exclusive of UAAL has been projected for the duration of the five-year forecast at a 1.0% rate of increase annually.

- The district provides health insurance to employees, adopting the “hard cap” on the dollar limits the district may pay for health insurance due to legislative mandates and district implementation choice. Future increases to the employer hard cap limits are subject to the medical consumer price index, which the district has no jurisdiction over. The forecast assumes an annual growth rate of 4.0% in the medical CPI for all five years of the forecast.
- Purchased services accounts are forecasted to increase 2% for all years of the forecast due to inflation.
- Supply and material budgets as well as dues and fees are projected to grow by 2-3% for the duration of the forecast.

**Fund Balance**

The Unassigned Fund Balance forecast shows an estimated fund balance of the following levels:

2027-28	\$4.4 million	12.7%
2028-29	\$5.5 million	16.7%
2029-30	\$6.3 million	21.3%
2030-31	\$6.1 million	20.2%
2031-32	\$5.5 million	17.5%

**OAKLAND SCHOOLS GENERAL EDUCATION FUND  
REVENUE AND EXPENDITURE BUDGET  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 BUDGET</b>	<b>FY 2027 PROPOSED BUDGET</b>	<b>NOTES</b>	<b>FY TO FY % CHANGE</b>
<b>FUND EQUITY, BEGINNING OF YEAR</b>					
Non-Spendable Prepaids, Inventory, & Deposits	55,353	66,400	66,400		0.00%
Assigned	7,700,000	9,796,000	11,233,100		14.67%
Unassigned	4,660,488	4,713,600	4,134,700		-12.28%
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>12,415,841</b>	<b>14,576,000</b>	<b>15,434,200</b>		<b>5.89%</b>
<b>REVENUE</b>					
<b>LOCAL SOURCES</b>					
Property Taxes	14,846,578	15,547,600	16,076,200	A	3.40%
Interest on Investments	1,593,532	1,500,000	1,200,000	B	-20.00%
Auxiliary Services - Purchasing Card Rebate	41,725	40,000	40,000		0.00%
Central Applicant Tracking	163,151	167,200	175,500		4.96%
Community Telecommunications Network (CTN)	750,000	750,000	600,000	C	-20.00%
Conference Center - Catering Revenue	39,753	28,500	28,500		0.00%
Cooperative Purchasing Rebates	185,591	173,000	173,000		0.00%
District & School Services - Discovery/Learn 360	211,730	238,900	212,000		-11.26%
District & School Services - Illuminate	513,724	537,000	536,300		-0.13%
District & School Services - Rubicon West	82,316	85,500	82,000		-4.09%
MAISA IGA	81,615	-	-		0.00%
MOR COOP Fees	11,375	85,200	85,200		0.00%
Rental - Facility Rental Fees (External)	23,546	11,000	11,000		0.00%
Rental - Virtual Learning Academy	34,300	25,100	25,100		0.00%
SCECH Credits	5,205	-	-		0.00%
Technology Services - Student Application	607,516	612,000	614,700		0.44%
Technology Services - Virtual (Cloud) Server Area Storage	117,637	127,700	127,700		0.00%
Workshop Fees	346,383	350,000	350,000		0.00%
Miscellaneous & Other	71,618	58,000	56,500		-2.59%
<b>TOTAL LOCAL SOURCES</b>	<b>19,727,295</b>	<b>20,336,700</b>	<b>20,393,700</b>		<b>0.28%</b>
<b>STATE SOURCES</b>					
Section 81 - General Aid	4,482,875	4,693,600	4,787,500		2.00%
Section 147a(2) MPSERS Normal Cost Offset	426,035	571,700	447,200	D	-21.78%
Section 147a(3) MPSERS Cost Offset ISDs & Districts	119,169	-	-		0.00%
Section 147a(4) MPSERS Cost Offset - Reduced UAAL	631,050	-	-		0.00%
Section 147c(1) MPSERS UAAL Rate Stabilization	1,160,635	1,839,300	1,932,400		5.06%
Section 147c(2) MPSERS One Time Deposit	263,817	-	-		0.00%
Section 147e MPSERS Employer DC Match	57,417	75,500	75,500		0.00%
Section 147g MPSERS 3% Healthcare Reimbursement	216,687	-	-		0.00%
Section 27L4 Healthcare Offset	-	170,500	-	E	-100.00%
MPSERS DC Credit	23,262	37,000	37,000		0.00%
Section 152a Headlee Obligation for Data Collections	264	200	200		0.00%
Section 26.a Renaissance Zone	1,585	1,600	1,600		0.00%
Section 26d Brownfield Redevelopment Reimbursement	74,033	47,800	47,800		0.00%
State Payment in Lieu of Taxes	163,336	164,700	164,700		0.00%
State Payment in Lieu of Taxes - SBTE	-	15,200	15,200		0.00%
<b>TOTAL STATE SOURCES</b>	<b>7,620,165</b>	<b>7,617,100</b>	<b>7,509,100</b>		<b>-1.42%</b>
<b>OTHER FINANCING SOURCES</b>					
Proceeds from Sale of Capital Assets	18,000	-	-		0.00%
Transfer from Fund 270 - Indirect	261,155	269,200	276,000		2.53%
Transfer from MiPeer Fund 277	127,000	127,000	130,000		2.36%
Indirect Revenue	484,544	326,300	326,300		0.00%
<b>TOTAL OTHER FINANCING SOURCES</b>	<b>890,699</b>	<b>722,500</b>	<b>732,300</b>		<b>1.36%</b>
<b>TOTAL REVENUE</b>	<b>28,238,159</b>	<b>28,676,300</b>	<b>28,635,100</b>		<b>-0.14%</b>
<b>TOTAL REVENUE AND BEGINNING FUND BALANCE</b>	<b>40,654,000</b>	<b>43,252,300</b>	<b>44,069,300</b>		<b>1.89%</b>

**OAKLAND SCHOOLS GENERAL EDUCATION FUND  
REVENUE AND EXPENDITURE BUDGET  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 BUDGET</b>	<b>FY 2027 PROPOSED BUDGET</b>	<b>NOTES</b>	<b>FY TO FY % CHANGE</b>
EXPENDITURES					
General Administration	2,485,213	3,420,100	3,428,200		0.24%
Finance & Operations	8,652,280	10,698,000	10,750,400		0.49%
Instructional Programs & Services	9,081,485	10,531,000	10,923,100		3.72%
Plant & Fixed Charges	5,859,011	3,169,000	2,312,200		-27.04%
<b>TOTAL EXPENDITURES</b>	<b>26,077,989</b>	<b>27,818,100</b>	<b>27,413,900</b>		<b>-1.45%</b>
Operating Surplus/(Deficit)	2,160,170	858,200	1,221,200		42.30%
FUND EQUITY, END OF YEAR					
Non-Spendable Prepaids, Inventory, & Deposits	66,417	66,400	66,400		0.00%
Assigned	9,796,000	11,233,100	12,407,300		10.45%
Unassigned	4,713,594	4,134,700	4,181,700		1.14%
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>14,576,011</b>	<b>15,434,200</b>	<b>16,655,400</b>		<b>7.91%</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>40,654,000</b>	<b>43,252,300</b>	<b>44,069,300</b>		<b>1.89%</b>

**OAKLAND SCHOOLS GENERAL EDUCATION FUND  
EXPENDITURE BUDGET SUMMARY  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>	<b>NOTES</b>	<b>FY TO FY % CHANGE</b>
<b>General Administration</b>					
001 Office of the Superintendent	412,504	446,700	456,900		2.28%
002 Deputy Superintendent	281,138	369,700	373,300		0.97%
003 Assistant Superintendent - Finance & Operations	182,611	190,100	185,400		-2.47%
006 LEA & Administration Support	530,043	746,700	740,900		-0.78%
049 Communications Services	513,375	582,600	583,400		0.14%
083 Human Resources	395,699	910,300	905,600		-0.52%
084 Central Applicant Tracking	169,843	174,000	182,700		5.00%
<b>GROUP TOTAL</b>	<b>2,485,213</b>	<b>3,420,100</b>	<b>3,428,200</b>		<b>0.24%</b>
<b>Finance &amp; Operations</b>					
011 Financial Services	421,578	527,300	531,300		0.76%
013 Event Management	392,113	484,700	475,900		-1.82%
014 Government Relations	346,945	367,300	370,200		0.79%
028 Technology Services - Technology Licensing	1,924,600	2,151,600	2,206,000		2.53%
029 Technology Services - Administration	143,930	159,300	159,900		0.38%
030 Technology Services - Technical Support Services	655,654	667,400	598,200		-10.37%
031 Artificial Intelligence	-	911,000	911,000		0.00%
032 Technology Services - Application Services	2,103,490	2,252,200	2,233,900		-0.81%
033 Technology Services - Enterprise Technical Services	629,630	755,700	749,400		-0.83%
038 Legal Affairs	318,311	477,300	487,100		2.05%
039 Records Management	1,595	14,400	14,400		0.00%
040 Auxiliary Services, Maintenance, & Facility Operations	182,494	191,900	181,500		-5.42%
041 Facilities & Building Projects	230,570	274,500	275,400		0.33%
042 Office of Purchasing Management	189,372	234,100	237,400		1.41%
044 Pupil, Corporate, & District Services	605,025	637,700	664,700		4.23%
045 Auxiliary Services - Pupil Transportation	155,234	200,500	208,300		3.89%
047 Auxiliary Services - Shipping & Receiving	94,905	133,400	188,200	F	41.08%
048 Child Nutrition	256,834	257,700	257,600		-0.04%
<b>GROUP TOTAL</b>	<b>8,652,280</b>	<b>10,698,000</b>	<b>10,750,400</b>		<b>0.49%</b>
<b>Instructional Programs &amp; Services</b>					
018 Workshops	503,295	883,500	883,500		0.00%
081 District & School Services - School Culture & Climate	1,377,094	1,615,200	1,632,200		1.05%
082 District & School Services - Early Childhood	846,473	881,900	1,131,300	G	28.28%
085 District & School Services - Instruction & Pedagogy	2,768,566	3,081,200	3,151,500		2.28%
086 District & School Services - Research, Eval, & Assessment Plus	524,566	558,300	567,500		1.65%
087 District & School Services - Curriculum & Assessment	1,404,462	1,677,000	1,665,500		-0.69%
089 District & School Services - Leadership & School Improvement	1,657,029	1,833,900	1,891,600		3.15%
<b>GROUP TOTAL</b>	<b>9,081,485</b>	<b>10,531,000</b>	<b>10,923,100</b>		<b>3.72%</b>
<b>Plant &amp; Fixed Charges</b>					
011 TXG-Property Tax Adjustments & Fees	33,415	51,600	53,600		3.88%
091 Plant & Fixed Charges - Facility Operations	446,111	427,800	498,500		16.53%
092 Plant & Fixed Charges - Telephone	58,186	118,500	119,300		0.68%
093 Facility Operations - Summit Place North	158,473	132,700	132,400		-0.23%
094 Plant & Fixed Charges - Capital Outlay	318,526	800,000	870,000		8.75%
095 Operating Transfers Out	4,844,300	1,638,400	638,400	H	-61.04%
<b>GROUP TOTAL</b>	<b>5,859,011</b>	<b>3,169,000</b>	<b>2,312,200</b>		<b>-27.04%</b>
<b>TOTAL EXPENDITURES</b>	<b>26,077,989</b>	<b>27,818,100</b>	<b>27,413,900</b>		<b>-1.45%</b>

**OAKLAND SCHOOLS GENERAL EDUCATION FUND**

**FOOTNOTES**

**FISCAL YEAR 2026-2027**

**FOOTNOTES: Highlighting line items that are +/-25% and/or +/- \$100K from last year**

- A The 3.4% increase in Property Tax Revenue reflects the tax base growth and its impact on the District's property tax revenues as forecasted by the Oakland County Equalization Department.
- B The decrease in Interest on Investments is a conservative projection due to forecasted economic uncertainties.
- C 2025-26 includes a one-time additional distribution payment of \$150,000 from CTN.
- D 2025-26 includes a one-time adjustment that is removed in FY27.
- E 2025-26 includes one-time funding that is removed in FY27.
- F 2026-27 includes the addition of a 1.0 FTE Warehouse Supervisor.
- G 2026-27 reflects the reallocation of several Early Childhood staff from grant funds to the General Education Fund.
- H 2025-26 includes a one-time fund transfer to the Career Focused Education Fund.

# Oakland Schools

## Annual Budgeting Amendment Report

As of 3/6/2026

	Function	Location Description	FY2026 Amendment	FY2027
<b>Type: 4 Revenue</b>				
	<b>Fund: 100</b>	General Education Fund		
	<b>Function: 000</b>	Not Applicable		
	<b>Function: 000</b>	Not Applicable	<b>Total:</b>	
	<b>Fund: 100</b>	General Education Fund	<b>Total:</b>	
	<b>Type: 4</b>	Revenue	<b>Total:</b>	
			28,676,300.00	28,635,100.00
			28,676,300.00	28,635,100.00
			28,676,300.00	28,635,100.00
<b>Type: 5 Expense</b>				
	<b>Fund: 100</b>	General Education Fund		
	<b>Function: 211</b>	Truancy/Absenteeism Services		
	<b>Function: 211</b>	Truancy/Absenteeism Services	<b>Total:</b>	
			262,200.00	260,400.00
	<b>Function: 213</b>	Health Services		
	<b>Function: 213</b>	Health Services	<b>Total:</b>	
			373,100.00	373,100.00
	<b>Function: 219</b>	Othr Pupil Support Svc		
	<b>Function: 219</b>	Othr Pupil Support Svc	<b>Total:</b>	
			0.00	0.00
	<b>Function: 221</b>	Improve of Instruction		
	<b>Function: 221</b>	Improve of Instruction	<b>Total:</b>	
			8,111,200.00	8,393,700.00
	<b>Function: 225</b>	Technology Assisted Instructn		
	<b>Function: 225</b>	Technology Assisted Instructn	<b>Total:</b>	
			613,400.00	604,500.00
	<b>Function: 226</b>	Supv/Dir Instr Staff		
	<b>Function: 226</b>	Supv/Dir Instr Staff	<b>Total:</b>	
			363,000.00	472,600.00
	<b>Function: 231</b>	Board of Education		
	<b>Function: 231</b>	Board of Education	<b>Total:</b>	
			145,900.00	145,900.00
	<b>Function: 232</b>	Exec Administration		
	<b>Function: 232</b>	Exec Administration	<b>Total:</b>	
			1,795,100.00	1,816,900.00
	<b>Function: 252</b>	Fiscal Services		
	<b>Function: 252</b>	Fiscal Services	<b>Total:</b>	
			1,237,300.00	1,238,800.00
	<b>Function: 257</b>	Internal Services		
	<b>Function: 257</b>	Internal Services	<b>Total:</b>	
			322,300.00	366,700.00
	<b>Function: 259</b>	Oth Business Svcs		
	<b>Function: 259</b>	Oth Business Svcs	<b>Total:</b>	
			62,200.00	65,000.00
	<b>Function: 261</b>	Oper Bldg Svcs		
	<b>Function: 261</b>	Oper Bldg Svcs	<b>Total:</b>	
			689,500.00	761,500.00
	<b>Function: 266</b>	Security Services		
	<b>Function: 266</b>	Security Services	<b>Total:</b>	
			30,800.00	30,400.00
	<b>Function: 271</b>	Pupil Transportation Services		
	<b>Function: 271</b>	Pupil Transportation Services	<b>Total:</b>	
			200,500.00	208,300.00
	<b>Function: 281</b>	Plan, Research, Dev and Eval		
	<b>Function: 281</b>	Plan, Research, Dev and Eval	<b>Total:</b>	
			559,900.00	568,800.00
	<b>Function: 282</b>	Communication Services		
	<b>Function: 282</b>	Communication Services	<b>Total:</b>	
			571,600.00	572,200.00
	<b>Function: 283</b>	Staff/Personnel Svcs		
	<b>Function: 283</b>	Staff/Personnel Svcs	<b>Total:</b>	
			718,100.00	713,400.00
	<b>Function: 284</b>	Support Svcs Tech		
	<b>Function: 284</b>	Support Svcs Tech	<b>Total:</b>	
			6,896,800.00	6,918,100.00
	<b>Function: 285</b>	Pupil Accounting		
	<b>Function: 285</b>	Pupil Accounting	<b>Total:</b>	
			375,500.00	404,300.00
	<b>Function: 289</b>	Other Central Services		

**Oakland Schools**  
**Annual Budgeting Amendment Report**  
As of 3/6/2026

Function		Location Description		FY2026 Amendment	FY2027
Function: 289	Other Central Services		Total:	537,300.00	545,900.00
Function: 299	Other Support Services				
Function: 299	Other Support Services		Total:	1,368,200.00	1,359,400.00
Function: 456	Building Improv Svcs				
Function: 456	Building Improv Svcs		Total:	756,300.00	756,000.00
Function: 511	Debt Svc LT-Principal				
Function: 511	Debt Svc LT-Principal		Total:	189,500.00	199,600.00
Function: 626	Fund Mod-Vocational Ed Fund				
Function: 626	Fund Mod-Vocational Ed Fund		Total:	1,000,000.00	0.00
Function: 627	Fund Mod-Co-op Activity				
Function: 627	Fund Mod-Co-op Activity		Total:	438,400.00	438,400.00
Function: 634	Fund Mod-QSCB Defeasement				
Function: 634	Fund Mod-QSCB Defeasement		Total:	0.00	0.00
Function: 647	Fund Mod-CP Adm Bldg Reno				
Function: 647	Fund Mod-CP Adm Bldg Reno		Total:	200,000.00	200,000.00
Fund: 100	General Education Fund		Total:	27,818,100.00	27,413,900.00
Type: 5	Expense		Total:	27,818,100.00	27,413,900.00

End of Report

# Oakland Schools

## Annual Budgeting Amendment Report

As of 3/6/2026

Location	Location Description	FY2026 Amendment	FY2027
<b>Type: 4 Revenue</b>			
<b>Fund: 100</b>	General Education Fund		
Location: 000	None	Total: 25,417,200.00	25,547,600.00
Location: 006	LEA & Administration Support	Total: 750,000.00	600,000.00
Location: 013	Event Management Operations	Total: 378,500.00	378,500.00
Location: 028	Tech Services-Licensing	Total: 750,200.00	746,000.00
Location: 032	Application Services	Total: 612,000.00	614,700.00
Location: 040	Auxiliary Services Admin	Total: 0.00	0.00
Location: 041	Facilities Management	Total: 37,600.00	37,600.00
Location: 042	Ofc of Procurement & Contracts	Total: 213,000.00	213,000.00
Location: 045	Pupil Transportation	Total: 1,500.00	0.00
Location: 048	Child Nutrition	Total: 85,200.00	85,200.00
Location: 084	Central Applicant Tracking	Total: 167,200.00	175,500.00
Location: 085	Instruction & Pedagogy	Total: 263,900.00	237,000.00
Fund: 100	General Education Fund	Total: 28,676,300.00	28,635,100.00
Type: 4	Revenue	Total: 28,676,300.00	28,635,100.00

**Type: 5 Expense**

<b>Fund: 100</b>	General Education Fund		
Location: 001	Office Of The Superintendent	Total: 446,700.00	456,900.00
Location: 002	Deputy Supt-Education Services	Total: 369,700.00	373,300.00
Location: 003	Asst Supt-Finance & Operations	Total: 190,100.00	185,400.00
Location: 006	LEA & Administration Support	Total: 746,700.00	740,900.00
Location: 011	Financial Services	Total: 578,900.00	584,900.00
Location: 013	Event Management Operations	Total: 484,700.00	475,900.00
Location: 014	Government & Community Svcs	Total: 367,300.00	370,200.00
Location: 018	Event Management-Workshops	Total: 883,500.00	883,500.00
Location: 028	Tech Services-Licensing	Total: 2,151,600.00	2,206,000.00
Location: 029	Tech Services Administration	Total: 159,300.00	159,900.00
Location: 030	Technical Support Services	Total: 667,400.00	598,200.00
Location: 031	Artificial Intelligence	Total: 911,000.00	911,000.00
Location: 032	Application Services	Total: 2,252,200.00	2,233,900.00
Location: 033	Enterprise Tech Services	Total: 755,700.00	749,400.00
Location: 038	Legal Affairs	Total: 477,300.00	487,100.00
Location: 039	Records Management	Total: 14,400.00	14,400.00
Location: 040	Auxiliary Services Admin	Total: 191,900.00	181,500.00
Location: 041	Facilities Management	Total: 274,500.00	275,400.00
Location: 042	Ofc of Procurement & Contracts	Total: 234,100.00	237,400.00
Location: 044	Corporate & District Services	Total: 637,700.00	664,700.00
Location: 045	Pupil Transportation	Total: 200,500.00	208,300.00
Location: 047	Shipping & Receiving	Total: 133,400.00	188,200.00
Location: 048	Child Nutrition	Total: 257,700.00	257,600.00
Location: 049	Communications Services	Total: 582,600.00	583,400.00
Location: 073	Special Pops Capacity Building	Total: 0.00	0.00
Location: 081	School Culture and Climate	Total: 1,615,200.00	1,632,200.00
Location: 082	Early Childhood	Total: 881,900.00	1,131,300.00
Location: 083	Human Resources	Total: 910,300.00	905,600.00
Location: 084	Central Applicant Tracking	Total: 174,000.00	182,700.00
Location: 085	Instruction & Pedagogy	Total: 3,081,200.00	3,151,500.00
Location: 086	Research/Evaluation & Assess	Total: 558,300.00	567,500.00

**Oakland Schools**  
**Annual Budgeting Amendment Report**  
As of 3/6/2026

Location	Location Description		FY2026 Amendment	FY2027
Location: 087	Curriculum & Assessment	Total:	1,677,000.00	1,665,500.00
Location: 089	Leadership & School Improvemnt	Total:	1,833,900.00	1,891,600.00
Location: 091	Plant & Fixed-Plant Operations	Total:	427,800.00	498,500.00
Location: 092	Plant & Fixed-Telephone	Total:	118,500.00	119,300.00
Location: 093	Plant & Fixed-Plant Ops Summit	Total:	132,700.00	132,400.00
Location: 094	Plant & Fixed-Capital Outlay	Total:	800,000.00	870,000.00
Location: 095	Transfers Out	Total:	1,638,400.00	638,400.00
Fund: 100	General Education Fund	Total:	27,818,100.00	27,413,900.00
Type: 5	Expense	Total:	27,818,100.00	27,413,900.00

End of Report

**OAKLAND SCHOOLS GENERAL EDUCATION  
FUNDED PROJECTS/GRANTS  
REVENUE AND EXPENDITURE BUDGET  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>	<b>FY TO FY % CHANGE</b>
<b>FUND 105</b>				
FUND EQUITY, BEGINNING OF YEAR				
Non-Spendable for Prepaids, Inventory, & Deposits Unassigned	87,570 (239,426)	7,800 (326,900)	7,800 (326,900)	0.00% 0.00%
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>(151,856)</b>	<b>(319,100)</b>	<b>(319,100)</b>	<b>0.00%</b>
REVENUE				
Local & Other Sources	764,322	2,800,000	1,811,900	-35.29%
State Sources	67,044,133	128,600,000	132,552,000	3.07%
Federal Sources	4,160,141	5,546,000	5,172,600	-6.73%
<b>TOTAL REVENUE</b>	<b>71,968,596</b>	<b>136,946,000</b>	<b>139,536,500</b>	<b>1.89%</b>
<b>TOTAL REVENUE AND BEGINNING FUND BALANCE</b>	<b>71,816,740</b>	<b>136,626,900</b>	<b>139,217,400</b>	<b>1.90%</b>
EXPENDITURES				
Basic Programs - 110	145,998	23,400	187,300	700.43%
Added Needs - 120	150,833	101,000	95,500	-5.45%
Support Services Pupil - 210	1,275,412	1,342,000	1,140,100	-15.04%
Support Services Instructional Staff - 220	6,824,590	14,199,000	17,155,200	20.82%
Support Services General Administration - 230	358	70,000	36,900	-47.29%
Support Services School Administration - 240	200	-	-	0.00%
Support Services Business - 250	120,150	145,300	117,500	-19.13%
Operation & Maintenance - 260	76,503	170,200	20,300	-88.07%
Pupil Transportation - 270	1,802,023	2,828,000	2,505,500	-11.40%
Support Services Central - 280	616,935	3,415,000	4,803,700	40.66%
Support Service - Other - 290	21,900	10,000	-	-100.00%
Community Services Direction - 310	349,633	90,500	83,000	-8.29%
Community Activities - 330	768,340	558,500	226,800	-59.39%
Welfare Activities - 360	10,966	60,700	60,100	-0.99%
Payments to Other Public Schools - 410	40,817,443	76,104,800	69,119,700	-9.18%
Payments to Not for Profit Entities - 440	18,850,918	37,240,700	43,493,800	16.79%
Fund Modifications (Other Operating Transfers Out) - 610	303,598	586,900	491,100	-16.32%
<b>TOTAL EXPENDITURES</b>	<b>72,135,800</b>	<b>136,946,000</b>	<b>139,536,500</b>	<b>1.89%</b>
FUND EQUITY, END OF YEAR				
Non-Spendable for Prepaids, Inventory, & Deposits Unassigned	7,812 (326,872)	7,800 (326,900)	7,800 (326,900)	0.00% 0.00%
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>(319,060)</b>	<b>(319,100)</b>	<b>(319,100)</b>	<b>0.00%</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>71,816,740</b>	<b>136,626,900</b>	<b>139,217,400</b>	<b>1.90%</b>

**OAKLAND SCHOOLS**  
**GENERAL EDUCATION FUND**  
**5-YEAR FORECAST**

	Actuals 2024-25	AM2 2025-26	Proposed 2026-27	Projection 2027-28	Projection 2028-29	Projection 2029-30	Projection 2030-31	Projection 2031-32
<b>REVENUES:</b>								
Local Revenues:								
Property taxes	14,846,578	15,547,600	16,076,200	16,510,300	16,939,600	17,380,000	17,831,900	18,295,500
Investment revenue	1,593,532	1,500,000	1,200,000	700,000	600,000	500,000	500,000	500,000
Fee based services & misc. revenue	1,554,089	1,626,300	1,452,700	1,452,700	1,452,700	1,452,700	1,452,700	1,452,700
Technology fees - Applications	725,153	739,700	742,400	742,400	742,400	742,400	742,400	742,400
Technology fees - Illuminate	513,724	537,000	536,300	536,300	536,300	536,300	536,300	536,300
Workshop fees	343,383	350,000	350,000	350,000	350,000	350,000	350,000	350,000
Rental revenue	57,846	36,100	36,100	36,100	36,100	36,100	36,100	36,100
State Revenues	7,456,829	7,437,200	7,329,200	7,434,000	7,488,000	7,543,900	7,601,600	7,661,200
State Payment in Lieu of Taxes	163,336	179,900	179,900	179,900	179,900	179,900	179,900	179,900
Transfers In - CPDI & SRF	127,000	127,000	130,000	130,000	130,000	130,000	130,000	130,000
Transfer In - Fund 270 (indirect)	261,155	269,200	276,000	276,000	276,000	276,000	276,000	276,000
Other Financing Sources	595,534	326,300	326,300	326,300	326,300	326,300	326,300	326,300
<b>TOTAL REVENUES</b>	<b>28,238,159</b>	<b>28,676,300</b>	<b>28,635,100</b>	<b>28,674,000</b>	<b>29,057,300</b>	<b>29,453,600</b>	<b>29,963,200</b>	<b>30,486,400</b>
<b>EXPENDITURES:</b>								
Salaries/wages	9,844,411	11,015,900	11,737,700	12,125,000	12,525,100	12,938,400	13,365,400	13,806,500
Employee Benefits:								
FICA insurance	723,265	812,600	864,000	927,600	958,200	989,800	1,022,500	1,056,200
MPERS retirement program costs	2,930,649	3,107,800	3,033,300	3,248,900	3,389,700	3,536,600	3,689,800	3,849,700
MPERS Sec 147c & 147g	1,319,376	1,550,800	1,533,300	1,638,100	1,692,100	1,748,000	1,805,700	1,865,300
Healthcare insurance	1,202,542	1,213,800	1,338,600	1,392,100	1,447,800	1,505,700	1,565,900	1,628,500
Other employee insurances & benefits	388,915	426,700	491,900	516,500	542,300	569,400	597,900	627,800
Purchased Services - Contractors (3110-99)	594,880	1,825,000	1,814,400	1,868,800	1,924,900	1,982,600	2,042,100	2,103,400
Purchased Services	2,798,700	3,333,600	3,417,000	3,485,300	3,555,000	3,626,100	3,698,600	3,772,600
Supplies and Materials	508,614	690,100	686,200	706,800	728,000	749,800	772,300	795,500
Utilities	184,246	172,900	212,800	221,300	230,200	239,400	249,000	259,000
Capital Outlay (I.T. Refresh & other)	347,877	892,400	936,100	238,000	238,000	238,000	238,000	238,000
CTE Programming	-	-	-	2,426,000	-	-	-	-
Dues/Fees/Leases	364,546	335,400	345,900	352,800	359,900	367,100	374,400	381,900
Property tax abatement & delinquency WO	21,203	38,600	40,200	41,300	42,300	43,500	44,600	45,700
Artificial Intelligence (non-salary/benefits)	-	702,500	262,500	280,900	300,600	321,600	344,100	368,200
Safety/security placeholder	-	-	-	4,500,000	4,400,000	-	-	-
Transfers Out - CFE	-	1,000,000	-	-	-	-	-	-
Transfers Out - SRF	438,400	438,400	438,400	438,400	438,400	438,400	438,400	438,400
Transfers Out - QSCB	105,900	-	-	-	-	-	-	-
Transfers Out - CP Fund:	4,300,000	200,000	200,000	200,000	200,000	200,000	200,000	200,000
Transfers to LEAs	4,465	61,600	61,600	61,600	61,600	61,600	61,600	61,600
<b>TOTAL EXPENDITURES</b>	<b>26,077,989</b>	<b>27,818,100</b>	<b>27,413,900</b>	<b>34,669,400</b>	<b>33,034,100</b>	<b>29,356,000</b>	<b>30,110,300</b>	<b>31,098,300</b>
<b>OPERATING EXCESS (DEFICIT)</b>	<b>2,160,170</b>	<b>858,200</b>	<b>1,221,200</b>	<b>(5,995,400)</b>	<b>(3,976,800)</b>	<b>97,600</b>	<b>(147,100)</b>	<b>(611,900)</b>

**OAKLAND SCHOOLS  
GENERAL EDUCATION FUND  
5-YEAR FORECAST**

	<b>Actuals 2024-25</b>	<b>AM2 2025-26</b>	<b>Proposed 2026-27</b>	<b>Projection 2027-28</b>	<b>Projection 2028-29</b>	<b>Projection 2029-30</b>	<b>Projection 2030-31</b>	<b>Projection 2031-32</b>
<b>FUND BALANCES:</b>								
Beginning of Year - unassigned	4,660,488	4,713,600	4,134,700	4,181,700	4,418,100	5,501,600	6,258,500	6,088,600
Beginning of Year - assigned	7,700,000	9,796,000	11,233,100	12,407,300	6,175,500	1,115,200	455,900	478,700
Beginning of Year - unspendable	55,353	66,400	66,400	66,400	66,400	66,400	66,400	66,400
End of Year - unassigned	4,713,594	4,134,700	4,181,700	4,418,100	5,501,600	6,258,500	6,088,600	5,452,800
End of Year - assigned	9,796,000	11,233,100	12,407,300	6,175,500	1,115,200	455,900	478,700	502,600
End of Year - unspendable	66,417	66,400	66,400	66,400	66,400	66,400	66,400	66,400
End of Year Unassigned FB as % of Exp.	18.1%	14.9%	15.3%	12.7%	16.7%	21.3%	20.2%	17.5%



# **Special Education Fund Original Budget and Five-Year Forecast**

*Fiscal Year 2026-27*

## SPECIAL EDUCATION FUND SPECIFIC ANALYSIS

### FUND OVERVIEW

The Oakland Schools Special Education Fund is projected to have a FY 2026-27 year-end restricted fund balance (at the time of this printing) of \$1,239,400. Anticipated ending fund balances for FY 2025-26 and 2026-27 are detailed in the schedule below:

	FY 2025-26 Amend 2 Budget	FY 2026-27 Budget
Non-Spendable Prepaids	\$ 39,200	\$ 39,200
Restricted for Center Facility Renovations	20,943,200	15,934,100
Restricted	1,167,200	1,239,400
Total Budgeted Ending Fund Balance	\$ 22,149,600	\$ 17,212,700

Included in the above fund balance summary, is an estimated \$15,934,100 to be restricted for future special education center facility renovations. This restricted fund balance component is available for center program operators to request funding for renovations. This component of restricted fund balance has been reduced in the 2026-27 budget due to Oxford Community Schools' construction of an Autism Spectrum Disorder (ASD) Center Program, for which they have requested \$5.6 million over FY26 and FY27.

FY 2026-27 revenue is projected to be \$216.6 million:

- Property taxes - \$204.6 million (94% of total revenue)
- Other local revenues - \$2.5 million
- State Source revenues - \$9.2 million
- Other Financing Sources - \$0.3 million

FY 2026-27 expenditures are projected to be \$221.5 million:

- Special Education - Program Supervision and Direction - \$2.9 million
- Special Education - Program Operations – \$13.2 million
- Special Education - Plant and Fixed charges – \$8.7 million
- Special Education – PA-18 Distribution – \$189.1 million
- Special Education - LEA Transfers and Program Subsidies – \$7.6 million

The PA-18 distribution base funding for fiscal year 2026-27 has been budgeted at \$189,106,200. An additional \$2,450,000 is budgeted for group home and medical student support issues, incarcerated youth, startup assistance, extraordinary contingency, assistive technology equipment and Section 24 payments provided to the local districts that operate educational programs in juvenile detention facilities. The District's Special Education Fund restricted fund balance is regulated by our fund balance target protocol. The protocol directs goal levels for the restricted fund balance of at least 5% of Oakland Schools operations. The Oakland Schools Board of Education has determined for the past several years that the District would budget for a 5% restricted fund balance. Our FY 2026-27 budget documents are developed, authorized and issued with fund balance expectations imbedded prior to the end of the current fiscal year using the current fiscal year revenue and expenditure budgets as a basis. Additional PA-18 funds may be released if the 2025-26 audited fund balance results are higher than the 5% target. The FY 2025 audited fund balance exceeded our current 5% target, and as such a supplemental PA-18 Distribution of \$5.8 million was distributed to the LEAs in FY 2026.

## **PROGRAM AND PERSONNEL**

The Special Populations Department within the Special Education Fund has historically been organized into four service delivery areas that interface through the Special Populations Administration. The four service delivery areas are:

- Compliance Support
- Capacity Building
- Student Services for Low Incidence
- Materials Center, Braille & Large Print Library

As discussed in the enterprise-wide overview, a new unit, Continuum of Supports, will be added to Special Populations services to address additional areas of support identified by the center program workgroup. As such, in FY 2026-27 staffing is projected to increase by 6.0 FTE for this unit. New positions consist of the following:

- Supervisor
- Social Worker
- ASD Consultant
- School Psychologist
- Board Certified Behavior Analyst
- Speech and Language Pathologist

Other minor staffing changes are detailed in the Enterprise Wide Executive Summary & Budget Assumptions under Staffing Changes.

### **Revenue**

The below represent significant assumptions and items of interest in the 2026-27 revenue budgets:

- Property taxes have been budgeted to increase by 3.4% based on our projections and supported by those of the Oakland County Equalization Division.
- Interest revenue is projected to decrease due to the uncertain economic forecast.
- State source revenue is held flat for FY 2026-27 pending a new state aid budget, apart from MPSERS categorical revenue. The District has adjusted the various MPSERS categoricals based on the most recent information available at the time of printing of this document.
- Other Financing Source revenues, which consist of indirect revenue on grants, are projected to remain consistent from 2025-26 to 2026-27. Indirect revenue is directly correlated to direct grant spending and fluctuates annually based on the timing of expenditures.

### **Expenditures**

The below represent significant assumptions and items of interest in the 2026-27 expenditure budgets:

- The Special Education PA-18 base distribution (department 078) shows an increase of \$5.2 million or 2.9% from the FY 2025-26 Amendment 2 budget. The FY 2025-26 budget contains a supplemental distribution budget of \$6.9 million not budgeted in FY 2026-27, of which \$5.8 million was distributed to constituent districts in December 2025 and the remaining may be distributed pending finalization of the year end audit.
- Salary and benefit budgets were forecasted in fiscal year 2026-27 to reflect a 2.0% across-the-board salary increase, plus step increases for staff not on the top step of their respective salary schedule. Budgets for 2026-27 assume all staff positions are filled for the entire fiscal year with no vacancies, whereas 2025-26 budgets have been adjusted for unfilled positions and vacancies through March 2026.

- Property Tax abatements reflect a budget of .25% of the property tax revenue budget to address the Michigan Tax Tribunal unsettled claims.
- Oxford Community Schools has been approved to receive \$5.6 million in funding from Oakland Schools for the construction of an ASD Center Program. The funding is contingent upon Oxford using the facility for special education purposes for twenty-five (25) years.

Additional variances are included on the footnote pages.

## **FIVE-YEAR FORECAST OVERVIEW**

Attached is the Special Education Fund (SEF) five-year operating forecast model. Significant assumptions utilized in the model are identified below:

### **REVENUE**

- Property tax revenues drive the revenue budget. Oakland Schools’ property tax collection rate has been historically very high and stable. Oakland Schools utilizes projections obtained from Oakland County Equalization to create our taxable value forecasts. Based on the expectation of growth of the real-estate market, offset by the possibility of a Headlee rollback, property taxes are forecasted to increase by the following percentages:
  - 2027-28 2.7%
  - 2028-29 through 2031-32 2.6%
- The investment revenue forecast model uses a formula to generate the expected revenue figures for each fiscal year period based on projected cash flows and expected rate of return. The factors relied upon in this forecast for a reduction in investment income are based on economic uncertainty and the potential for another recession. All investments are managed within the district’s investment policy and state law. The current state of economic affairs as of March 2026 makes investment income uncertain. The District will continue to monitor investment returns and modify forecasts as deemed necessary on an ongoing basis.
- Fee-based service revenues are budgeted at \$70,000 for 2026-27 and are expected to remain stable through the duration of the forecast.
- State source revenues for the Special Education Fund, primarily Section 51, are projected to remain flat for the duration of the five-year forecast model. MPSERS 147c(1) revenues within State Revenues are projected to increase correspondingly to the expenditure increase for the same item, as 147c(1) is revenue/expenditure neutral. The final significant component of state source revenues is State Payment in Lieu of Taxes which represents reimbursement to the organization for personal property tax losses by the Local Community Stabilization Authority.
- Other Financing Sources consist of the indirect revenues associated with our grant management responsibilities. This line item may fluctuate based on anticipated grant awards but is forecasted to remain flat.

### **EXPENDITURES**

- Oakland Schools’ non-union personnel salary and wage cycle is fiscal year based with regards to step movement and salary schedule increases. The forecast includes a salary/growth rate of 1.3%, which would be indicative of step movement from year to year. The forecast includes a 2% base salary increase for every year of the forecast.

- The FICA rate is 7.65%. This rate is multiplied by the wage base (social security rate of 6.2% applied to individuals wages up to \$184,500 for calendar year 2026) to produce the FICA costs for the year.
- There are 8 different retirement rates for school district employees, based on their hire date and/or their personal choice for retirement benefits.

The rates that are effective from October 1, 2025 through September 30, 2026 are:

	Basic/MIP with Premium Subsidy	Pension Plus with Premium Subsidy	Pension Plus PHF	Pension Plus to DC with PHF	Basic/MIP to DC with Premium Subsidy	Basic/MIP to DC with PHF	Basic/MIP with PHF	Pension Plus 2
Rate Chgd on Reported Payroll	29.91%	25.17%	21.34%	15.21%	19.04%	15.21%	26.08%	21.41%
MPSERS UAAL Stabilization Rate	15.02%	15.02%	15.02%	15.02%	15.02%	15.02%	15.02%	15.02%
Subtotal	44.93%	40.19%	36.36%	30.23%	34.06%	30.23%	41.10%	36.43%
DC Employer Mandatory	0.00%	0.00%	0.00%	4.00%	4.00%	4.00%	0.00%	0.00%
DC Employer Match	0.00%	1.00%	1.00%	3.00%	3.00%	3.00%	0.00%	1.00%
Personal Healthcare Fund (PHF)	0.00%	0.00%	2.00%	2.00%	0.00%	2.00%	2.00%	2.00%
<b>Total Rate Charged</b>	<b>44.93%</b>	<b>41.19%</b>	<b>39.36%</b>	<b>39.23%</b>	<b>41.06%</b>	<b>39.23%</b>	<b>43.10%</b>	<b>39.43%</b>

The forecasted rates for October 1, 2026 through September 30, 2027 contained in the Governor’s proposed FY27 budget are:

	Basic/MIP with Premium Subsidy	Pension Plus with Premium Subsidy	Pension Plus PHF	Pension Plus to DC with PHF	Basic/MIP to DC with Premium Subsidy	Basic/MIP to DC with PHF	Basic/MIP with PHF	Pension Plus 2
Rate Chgd on Reported Payroll	27.51%	22.77%	21.34%	15.21%	16.64%	15.21%	26.08%	21.41%
MPSERS UAAL Stabilization Rate	13.51%	13.51%	13.51%	13.51%	13.51%	13.51%	13.51%	13.51%
Subtotal	41.02%	36.28%	34.85%	28.72%	30.15%	28.72%	39.59%	34.92%
DC Employer Mandatory	0.00%	0.00%	0.00%	4.00%	4.00%	4.00%	0.00%	0.00%
DC Employer Match	0.00%	1.00%	1.00%	3.00%	3.00%	3.00%	0.00%	1.00%
Personal Healthcare Fund (PHF)	0.00%	0.00%	2.00%	2.00%	0.00%	2.00%	2.00%	2.00%
<b>Total Rate Charged</b>	<b>41.02%</b>	<b>37.28%</b>	<b>37.85%</b>	<b>37.72%</b>	<b>37.15%</b>	<b>37.72%</b>	<b>41.59%</b>	<b>37.92%</b>

In order to project a budgeted rate overall for Oakland Schools for 2026-27, an analysis of how many employees we have on each of these plans was studied. A blended rate, exclusive of UAAL, for budgeting retirement costs for 2026-27 has been established at 26.53%. The blended rate exclusive of UAAL has been projected for the duration of the five-year forecast at a 1.0% rate of increase annually.

- The district provides health insurance to employees, adopting the “hard cap” on the dollar limits the district may pay for health insurance due to legislative mandates and district implementation choice. Future increases to the employer hard cap limits are subject to the medical consumer price index, which the district has no jurisdiction over. The forecast assumes an annual growth rate of 4.0% in the medical CPI for all five years of the forecast.
- Purchased services accounts are forecasted to increase 2% for all years of the forecast due to inflation.
- Supply and material budgets as well as dues and fees are projected to grow by 2-3% for the duration of the forecast.

- Capital outlay costs are budgeted to stay flat at \$378,500 annually for the entire forecast. The Capital Outlay budget agrees to the 5-Year Capital Outlay Plan that is being presented to the School Board for first reading on March 24, 2026.
- The SEF distributes Public Act-18 funds to local districts to support new program start-up costs, extraordinary cost reimbursement and distributions calculated through the PA-18 funding distribution model (“LEA base distribution”). The largest component of funds distributed is the LEA base distribution. The start-up and extraordinary cost budgets, along with other budgets for assistive technology capital to be made available to the districts, along with other special education appropriations, is included in LEA support in the forecasts.

The LEA base distribution amounts projected are as follows:

• 2027-28	• \$194,028,200
• 2028-29	• \$198,582,100
• 2029-30	• \$203,278,700
• 2030-31	• \$208,171,400
• 2031-32	• \$213,183,800

- The property tax abatement budget is set at .25% of budgeted annual property tax revenue for all years of this forecast.

### **FUND BALANCE**

The Fund Balance Target protocol per Oakland Schools Board policy is at least 5% of expenditures. The Oakland Schools Board of Education has determined that during these past several years of economic difficulties for our constituent districts, we would budget for a 5% restricted fund balance. The forecast shows an estimated Restricted – Special Education fund balance of the following levels:

2027-28	\$1.3 million	5.0%
2028-29	\$1.3 million	5.0%
2029-30	\$1.4 million	5.0%
2030-31	\$1.4 million	5.0%
2031-32	\$1.5 million	5.0%

The PA 18 distribution to local districts is adjusted to ensure that the fund only retains a fund balance of approximately 5% and therefore maximizes the amounts available to be distributed to the LEA’s.

**OAKLAND SCHOOLS SPECIAL EDUCATION FUND  
REVENUE AND EXPENDITURE BUDGET  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>	<b>NOTES</b>	<b>FY TO FY % CHANGE</b>
<b>FUND EQUITY, BEGINNING OF YEAR</b>					
Non-Spendable for Prepaids, Inventory, & Deposits	41,729	39,200	39,200		0.00%
Restricted for Future SE Center Facility Renovations	20,000,000	21,500,000	20,943,200		-2.59%
Restricted - Special Education	6,660,456	6,901,300	1,167,200		-83.09%
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>26,702,185</b>	<b>28,440,500</b>	<b>22,149,600</b>		<b>-22.12%</b>
<b>REVENUE</b>					
<b>LOCAL SOURCES</b>					
Property Taxes	188,838,055	197,835,800	204,562,200	A	3.40%
Interest on Investments	3,749,235	3,136,700	2,509,400	B	-20.00%
Workshop Fees	64,716	50,000	50,000		0.00%
Miscellaneous & Other	40,423	20,000	20,000		0.00%
<b>TOTAL LOCAL SOURCES</b>	<b>192,692,429</b>	<b>201,042,500</b>	<b>207,141,600</b>		<b>3.03%</b>
<b>STATE SOURCES</b>					
Special Ed Sec 51A	4,455,952	4,040,000	4,040,000		0.00%
Special Ed Sec 51e Foundation Payments	86,472	53,300	53,300		0.00%
Section 147a(2) MPSERS Normal Cost Offset	403,321	541,000	423,400	C	-21.74%
Section 147a(3) MPSERS Cost Offset ISDs & Districts	112,815	-	-		0.00%
Section 147a(4) MPSERS Cost Offset - Reduced UAAL	597,405	-	-		0.00%
Section 147c(1) MPSERS UAAL Rate Stabilization	1,098,755	1,740,600	1,756,400		0.91%
Section 147c(2) MPSERS One Time Deposit	249,751	-	-		0.00%
Section 147e MPSERS Employer DC Match	54,356	71,500	71,500		0.00%
Section 147g MPSERS 3% Healthcare Reimbursement	223,776	-	-		0.00%
Section 27L4 Healthcare Offset	-	161,400	-	D	-100.00%
MPSERS DC Credit	18,449	31,800	31,800		0.00%
Section 26.a Renaissance Zone	20,162	20,300	20,300		0.00%
Section 26d Brownfield Redevelopment Reimbursement	941,644	608,400	608,400		0.00%
Michigan School for Deaf/Blind Section 54	136,598	77,700	77,700		0.00%
Michigan School for Deaf/Blind Deduct (net) 51a.1	(342,107)	(202,700)	(202,700)		0.00%
State Payment in Lieu of Taxes	2,077,524	2,094,600	2,094,600		0.00%
State Payment in Lieu of Taxes - SBTE	-	193,600	193,600		0.00%
<b>TOTAL STATE SOURCES</b>	<b>10,134,873</b>	<b>9,431,500</b>	<b>9,168,300</b>		<b>-2.79%</b>
<b>OTHER FINANCING SOURCES</b>					
Indirect Revenue	279,078	250,000	250,000		0.00%
<b>TOTAL OTHER FINANCING SOURCES</b>	<b>279,078</b>	<b>250,000</b>	<b>250,000</b>		<b>0.00%</b>
<b>TOTAL REVENUE</b>	<b>203,106,380</b>	<b>210,724,000</b>	<b>216,559,900</b>		<b>2.77%</b>
<b>TOTAL REVENUE AND BEGINNING FUND BALANCE</b>	<b>229,808,565</b>	<b>239,164,500</b>	<b>238,709,500</b>		<b>-0.19%</b>
<b>EXPENDITURE SUMMARY</b>					
Oakland Schools - Program Supervision & Direction	2,301,172	2,702,400	2,923,200		8.17%
Oakland Schools - Program Operations	11,367,662	12,010,300	13,183,900		9.77%
Oakland Schools - Plant & Fixed Charges	7,292,882	8,365,000	8,681,400		3.78%
PA-18 Distribution	173,974,823	183,872,500	189,106,200		2.85%
PA-18 Additional Distribution	5,600,000	6,911,600	-		-100.00%
LEA Transfers & Program Subsidies	831,515	3,153,100	7,602,100		141.10%
<b>TOTAL EXPENDITURES</b>	<b>201,368,054</b>	<b>217,014,900</b>	<b>221,496,800</b>		<b>2.07%</b>
Operating Surplus/(Deficit)	1,738,326	(6,290,900)	(4,936,900)		-21.52%
<b>FUND EQUITY, END OF YEAR</b>					
Non-Spendable for Prepaids, Inventory, & Deposits	39,197	39,200	39,200		0.00%
Restricted for Future SE Center Facility Renovations	21,500,000	20,943,200	15,934,100		-23.92%
Restricted - Special Education	6,901,314	1,167,200	1,239,400		6.19%
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>28,440,511</b>	<b>22,149,600</b>	<b>17,212,700</b>		<b>-22.29%</b>
<b>TOTAL EXPEND AND ENDING BALANCE:</b>	<b>229,808,565</b>	<b>239,164,500</b>	<b>238,709,500</b>		<b>-0.19%</b>

**OAKLAND SCHOOLS SPECIAL EDUCATION FUND  
EXPENDITURE BUDGET SUMMARY  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>	<b>NOTES</b>	<b>FY TO FY % CHANGE</b>
<b>Oakland Schools - Program Supervision &amp; Direction</b>					
071 Compliance Support - Supervision & Direction 226	239,125	252,400	249,400		-1.19%
072 Continuum of Supports - Supervision & Direction 226	-	-	232,700	E	100.00%
073 Capacity Building - Supervision & Direction 226	577,895	647,000	649,300		0.36%
074 SSLI - Supervision & Direction 226	493,903	551,900	548,200		-0.67%
075 Executive Director - Supervision & Direction 226	743,799	954,300	948,700		-0.59%
076 Assistive Material Center - Supervision & Direction 226	246,450	296,800	294,900		-0.64%
<b>GROUP TOTAL</b>	<b>2,301,172</b>	<b>2,702,400</b>	<b>2,923,200</b>		<b>8.17%</b>
<b>Oakland Schools - Program Operations</b>					
018 Special Education Workshops	152,037	195,600	238,100		21.73%
071 Compliance Support - Support Services 281	914,378	958,100	948,200		-1.03%
072 Continuum of Supports - Support Services xxx	-	-	1,032,800	E	100.00%
073 Capacity Building - Psychological Services 214	662,013	692,300	694,700		0.35%
073 Capacity Building - Speech & Audiology 215	406,828	415,400	421,000		1.35%
073 Capacity Building - Social Work 216	221,206	201,800	181,100		-10.26%
073 Capacity Building - Teacher Consultant 218	1,217,359	1,258,400	1,284,300		2.06%
073 Capacity Building - Pupil Support 219	1,372,075	1,572,700	1,563,500		-0.58%
074 SSLI - Audiologists 215	774,203	831,500	839,300		0.94%
074 SSLI - Orient Mobility 217	649,514	641,300	647,400		0.95%
074 SSLI - Teacher Consultant 218	4,049,952	4,201,300	4,294,300		2.21%
076 Assistive Material Center 219	948,097	1,041,900	1,039,200		-0.26%
<b>GROUP TOTAL</b>	<b>11,367,662</b>	<b>12,010,300</b>	<b>13,183,900</b>		<b>9.77%</b>
<b>Oakland Schools - Plant &amp; Fixed Charges</b>					
011 Property Tax Adjustments & Fees	423,797	656,500	681,800		3.85%
091 Plant & Fixed Charges - Facility Operations	228,361	220,700	248,300		12.51%
092 Plant & Fixed Charges - Telephone	54,617	84,700	85,300		0.71%
093 Facility Operations - Summit Place North	301,602	444,600	587,200	F	32.07%
094 Plant & Fixed Charges - Capital Outlay	162,699	50,000	170,000	F	240.00%
095 Operating Transfers Out	213,300	115,100	115,100		0.00%
General Allocation	5,908,507	6,793,400	6,793,700		0.00%
<b>GROUP TOTAL</b>	<b>7,292,882</b>	<b>8,365,000</b>	<b>8,681,400</b>		<b>3.78%</b>
<b>PA-18 Distribution</b>					
078 PA-18 Base Distribution	173,974,823	183,872,500	189,106,200	G	2.85%
078 PA-18 Additional Distribution	5,600,000	6,911,600	-	H	-100.00%
<b>GROUP TOTAL</b>	<b>179,574,823</b>	<b>190,784,100</b>	<b>189,106,200</b>		<b>-0.88%</b>
<b>LEA Transfers &amp; Program Subsidies</b>					
078 LEA Transfers & Program Subsidies	831,515	2,596,300	2,593,000		-0.13%
079 SE Center Facility Renovations	-	556,800	5,009,100	I	799.62%
<b>GROUP TOTAL</b>	<b>831,515</b>	<b>3,153,100</b>	<b>7,602,100</b>		<b>141.10%</b>
<b>TOTAL EXPENDITURES</b>	<b>201,368,054</b>	<b>217,014,900</b>	<b>221,496,800</b>		<b>2.07%</b>

## OAKLAND SCHOOLS GENERAL EDUCATION FUND

### FOOTNOTES

#### FISCAL YEAR 2026-2027

#### FOOTNOTES: Highlighting line items that are +/-25% and/or +/- \$100K from last year

- A The 3.4% increase in Property Tax Revenue reflects the tax base growth and its impact on the District's property tax revenues as forecasted by the Oakland County Equalization Department.
- B The decrease in Interest on Investments is a conservative projection due to forecasted economic uncertainties.
- C 2025-26 includes a one-time adjustment that is removed in FY27.
- D 2025-26 includes one-time funding that is removed in FY27.
- E 2026-27 includes a new Special Populations unit, Continuum of Supports, with 6.0 FTEs (see discussion in Executive Summary).
- F 2026-27 includes an increase in refresh technology and equipment needs.
- G The PA-18 base distribution increase is a result of property tax revenue growth, offset by changes in the OS operational accounts contained in this budget.
- H The decrease in the PA-18 Additional Distribution reflects the one time additional distribution in 2025-26 to align with the Special Education fund balance protocol which distributes additional funds in excess of a 5% fund balance to the LEAs upon completion of the annual audit. Any additional distribution available for 2026-27 will be determined upon completion of the FY26 audit.
- I This budget line is for Oxford's new center program construction costs and reflects the anticipated cash flow of the project.

# Oakland Schools

## Annual Budgeting Amendment Report

As of 3/10/2026

	Function	Location Description	FY2026 Amendment	FY2027
<b>Type: 4 Revenue</b>				
	<b>Fund: 200</b>	Special Education Fund		
	<b>Function: 000</b>	Not Applicable		
	<b>Function: 000</b>	Not Applicable	<b>Total:</b>	
			210,724,000.00	216,559,900.00
	<b>Fund: 200</b>	Special Education Fund	<b>Total:</b>	
			210,724,000.00	216,559,900.00
	<b>Type: 4</b>	Revenue	<b>Total:</b>	
			210,724,000.00	216,559,900.00
<b>Type: 5 Expense</b>				
	<b>Fund: 200</b>	Special Education Fund		
	<b>Function: 122</b>	Special Education		
	<b>Function: 122</b>	Special Education	<b>Total:</b>	
			1,500,000.00	1,500,000.00
	<b>Function: 211</b>	Truancy/Absenteeism Services		
	<b>Function: 211</b>	Truancy/Absenteeism Services	<b>Total:</b>	
			134,700.00	133,300.00
	<b>Function: 212</b>	Guidance Services		
	<b>Function: 212</b>	Guidance Services	<b>Total:</b>	
			46,300.00	43,000.00
	<b>Function: 213</b>	Health Services		
	<b>Function: 213</b>	Health Services	<b>Total:</b>	
			100,000.00	100,000.00
	<b>Function: 214</b>	Psychological Services		
	<b>Function: 214</b>	Psychological Services	<b>Total:</b>	
			1,042,300.00	1,457,800.00
	<b>Function: 215</b>	Speech Path & Audiology		
	<b>Function: 215</b>	Speech Path & Audiology	<b>Total:</b>	
			1,296,900.00	1,516,800.00
	<b>Function: 216</b>	Social Work Services		
	<b>Function: 216</b>	Social Work Services	<b>Total:</b>	
			251,800.00	437,700.00
	<b>Function: 217</b>	Visual Aid Services		
	<b>Function: 217</b>	Visual Aid Services	<b>Total:</b>	
			761,300.00	767,400.00
	<b>Function: 218</b>	Teacher Consultant		
	<b>Function: 218</b>	Teacher Consultant	<b>Total:</b>	
			5,459,700.00	5,785,200.00
	<b>Function: 219</b>	Othr Pupil Support Svc		
	<b>Function: 219</b>	Othr Pupil Support Svc	<b>Total:</b>	
			2,794,600.00	2,782,700.00
	<b>Function: 221</b>	Improve of Instruction		
	<b>Function: 221</b>	Improve of Instruction	<b>Total:</b>	
			695,300.00	702,200.00
	<b>Function: 225</b>	Technology Assisted Instructn		
	<b>Function: 225</b>	Technology Assisted Instructn	<b>Total:</b>	
			36,500.00	31,900.00
	<b>Function: 226</b>	Supv/Dir Instr Staff		
	<b>Function: 226</b>	Supv/Dir Instr Staff	<b>Total:</b>	
			2,736,200.00	2,958,200.00
	<b>Function: 231</b>	Board of Education		
	<b>Function: 231</b>	Board of Education	<b>Total:</b>	
			108,000.00	107,900.00
	<b>Function: 232</b>	Exec Administration		
	<b>Function: 232</b>	Exec Administration	<b>Total:</b>	
			850,300.00	860,500.00
	<b>Function: 252</b>	Fiscal Services		
	<b>Function: 252</b>	Fiscal Services	<b>Total:</b>	
			682,700.00	688,200.00
	<b>Function: 257</b>	Internal Services		
	<b>Function: 257</b>	Internal Services	<b>Total:</b>	
			162,100.00	184,100.00
	<b>Function: 259</b>	Oth Business Svcs		
	<b>Function: 259</b>	Oth Business Svcs	<b>Total:</b>	
			665,100.00	691,000.00
	<b>Function: 261</b>	Oper Bldg Svcs		
	<b>Function: 261</b>	Oper Bldg Svcs	<b>Total:</b>	
			519,300.00	510,200.00
	<b>Function: 266</b>	Security Services		

**Oakland Schools**  
**Annual Budgeting Amendment Report**  
As of 3/10/2026

Function		Location Description		FY2026	FY2027
			Total:	Amendment	
Function: 266	Security Services		Total:	15,600.00	15,300.00
Function: 271	Pupil Transportation Services				
Function: 271	Pupil Transportation Services		Total:	68,400.00	71,500.00
Function: 281	Plan, Research, Dev and Eval				
Function: 281	Plan, Research, Dev and Eval		Total:	1,156,800.00	1,150,200.00
Function: 282	Communication Services				
Function: 282	Communication Services		Total:	285,500.00	285,100.00
Function: 283	Staff/Personnel Svcs				
Function: 283	Staff/Personnel Svcs		Total:	514,200.00	490,800.00
Function: 284	Support Svcs Tech				
Function: 284	Support Svcs Tech		Total:	2,737,600.00	3,003,200.00
Function: 285	Pupil Accounting				
Function: 285	Pupil Accounting		Total:	186,700.00	201,400.00
Function: 289	Other Central Services				
Function: 289	Other Central Services		Total:	74,800.00	74,800.00
Function: 299	Other Support Services				
Function: 299	Other Support Services		Total:	393,200.00	430,900.00
Function: 411	Pymt to K12 Public W/In St				
Function: 411	Pymt to K12 Public W/In St		Total:	190,784,100.00	189,106,200.00
Function: 456	Building Improv Svcs				
Function: 456	Building Improv Svcs		Total:	556,800.00	5,009,100.00
Function: 511	Debt Svc LT-Principal				
Function: 511	Debt Svc LT-Principal		Total:	283,000.00	285,100.00
Function: 627	Fund Mod-Co-op Activity				
Function: 627	Fund Mod-Co-op Activity		Total:	19,100.00	19,100.00
Function: 634	Fund Mod-QSCB Defeasement				
Function: 634	Fund Mod-QSCB Defeasement		Total:	0.00	0.00
Function: 647	Fund Mod-CP Adm Bldg Reno				
Function: 647	Fund Mod-CP Adm Bldg Reno		Total:	96,000.00	96,000.00
Fund: 200	Special Education Fund		Total:	217,014,900.00	221,496,800.00
Type: 5	Expense		Total:	217,014,900.00	221,496,800.00

End of Report

# Oakland Schools

## Annual Budgeting Amendment Report

As of 3/10/2026

	Location	Location Description		FY2026 Amendment	FY2027
<b>Type: 4 Revenue</b>					
<b>Fund: 200</b>	Special Education Fund				
	<b>Location: 000</b>	<b>None</b>	<b>Total:</b>	<b>210,674,000.00</b>	<b>216,509,900.00</b>
	<b>Location: 013</b>	<b>Event Management Operations</b>	<b>Total:</b>	<b>50,000.00</b>	<b>50,000.00</b>
	<b>Fund: 200</b>	<b>Special Education Fund</b>	<b>Total:</b>	<b>210,724,000.00</b>	<b>216,559,900.00</b>
	<b>Type: 4</b>	<b>Revenue</b>	<b>Total:</b>	<b>210,724,000.00</b>	<b>216,559,900.00</b>
<b>Type: 5 Expense</b>					
<b>Fund: 200</b>	Special Education Fund				
	<b>Location: 001</b>	<b>Office Of The Superintendent</b>	<b>Total:</b>	<b>223,000.00</b>	<b>228,300.00</b>
	<b>Location: 002</b>	<b>Deputy Supt-Education Services</b>	<b>Total:</b>	<b>157,300.00</b>	<b>158,700.00</b>
	<b>Location: 003</b>	<b>Asst Supt-Finance &amp; Operations</b>	<b>Total:</b>	<b>94,200.00</b>	<b>91,500.00</b>
	<b>Location: 006</b>	<b>LEA &amp; Administration Support</b>	<b>Total:</b>	<b>32,800.00</b>	<b>32,800.00</b>
	<b>Location: 011</b>	<b>Financial Services</b>	<b>Total:</b>	<b>1,144,900.00</b>	<b>1,173,100.00</b>
	<b>Location: 013</b>	<b>Event Management Operations</b>	<b>Total:</b>	<b>197,600.00</b>	<b>192,800.00</b>
	<b>Location: 014</b>	<b>Government &amp; Community Svcs</b>	<b>Total:</b>	<b>183,300.00</b>	<b>184,400.00</b>
	<b>Location: 018</b>	<b>Event Management-Workshops</b>	<b>Total:</b>	<b>195,600.00</b>	<b>238,100.00</b>
	<b>Location: 028</b>	<b>Tech Services-Licensing</b>	<b>Total:</b>	<b>458,300.00</b>	<b>469,900.00</b>
	<b>Location: 029</b>	<b>Tech Services Administration</b>	<b>Total:</b>	<b>77,500.00</b>	<b>77,700.00</b>
	<b>Location: 030</b>	<b>Technical Support Services</b>	<b>Total:</b>	<b>333,100.00</b>	<b>300,100.00</b>
	<b>Location: 032</b>	<b>Application Services</b>	<b>Total:</b>	<b>1,122,900.00</b>	<b>1,115,800.00</b>
	<b>Location: 033</b>	<b>Enterprise Tech Services</b>	<b>Total:</b>	<b>700,300.00</b>	<b>695,700.00</b>
	<b>Location: 038</b>	<b>Legal Affairs</b>	<b>Total:</b>	<b>245,900.00</b>	<b>250,900.00</b>
	<b>Location: 039</b>	<b>Records Management</b>	<b>Total:</b>	<b>7,300.00</b>	<b>7,400.00</b>
	<b>Location: 040</b>	<b>Auxiliary Services Admin</b>	<b>Total:</b>	<b>97,000.00</b>	<b>91,400.00</b>
	<b>Location: 041</b>	<b>Facilities Management</b>	<b>Total:</b>	<b>132,500.00</b>	<b>133,300.00</b>
	<b>Location: 042</b>	<b>Ofc of Procurement &amp; Contracts</b>	<b>Total:</b>	<b>216,100.00</b>	<b>218,700.00</b>
	<b>Location: 044</b>	<b>Corporate &amp; District Services</b>	<b>Total:</b>	<b>321,400.00</b>	<b>334,700.00</b>
	<b>Location: 045</b>	<b>Pupil Transportation</b>	<b>Total:</b>	<b>68,400.00</b>	<b>71,500.00</b>
	<b>Location: 047</b>	<b>Shipping &amp; Receiving</b>	<b>Total:</b>	<b>66,600.00</b>	<b>94,200.00</b>
	<b>Location: 049</b>	<b>Communications Services</b>	<b>Total:</b>	<b>291,000.00</b>	<b>290,700.00</b>
	<b>Location: 071</b>	<b>SE Compliance</b>	<b>Total:</b>	<b>1,210,500.00</b>	<b>1,197,600.00</b>
	<b>Location: 072</b>	<b>Continuum of Supports</b>	<b>Total:</b>	<b>0.00</b>	<b>1,265,500.00</b>
	<b>Location: 073</b>	<b>Special Pops Capacity Building</b>	<b>Total:</b>	<b>4,787,600.00</b>	<b>4,793,900.00</b>
	<b>Location: 074</b>	<b>Student Svcs for Low Incidence</b>	<b>Total:</b>	<b>6,226,000.00</b>	<b>6,329,200.00</b>
	<b>Location: 075</b>	<b>Compliance Supervision/Support</b>	<b>Total:</b>	<b>954,300.00</b>	<b>948,700.00</b>
	<b>Location: 076</b>	<b>Materials Center</b>	<b>Total:</b>	<b>1,338,700.00</b>	<b>1,334,100.00</b>
	<b>Location: 078</b>	<b>Program Subsidies-Special Ed</b>	<b>Total:</b>	<b>193,380,400.00</b>	<b>191,699,200.00</b>
	<b>Location: 079</b>	<b>SE Center Facility Renovations</b>	<b>Total:</b>	<b>556,800.00</b>	<b>5,009,100.00</b>
	<b>Location: 081</b>	<b>School Culture and Climate</b>	<b>Total:</b>	<b>309,900.00</b>	<b>316,300.00</b>
	<b>Location: 083</b>	<b>Human Resources</b>	<b>Total:</b>	<b>514,200.00</b>	<b>490,800.00</b>
	<b>Location: 085</b>	<b>Instruction &amp; Pedagogy</b>	<b>Total:</b>	<b>70,300.00</b>	<b>66,900.00</b>
	<b>Location: 086</b>	<b>Research/Evaluation &amp; Assess</b>	<b>Total:</b>	<b>196,700.00</b>	<b>200,400.00</b>
	<b>Location: 087</b>	<b>Curriculum &amp; Assessment</b>	<b>Total:</b>	<b>163,500.00</b>	<b>163,700.00</b>
	<b>Location: 089</b>	<b>Leadership &amp; School Improvemnt</b>	<b>Total:</b>	<b>23,900.00</b>	<b>23,800.00</b>
	<b>Location: 091</b>	<b>Plant &amp; Fixed-Plant Operations</b>	<b>Total:</b>	<b>220,700.00</b>	<b>248,300.00</b>
	<b>Location: 092</b>	<b>Plant &amp; Fixed-Telephone</b>	<b>Total:</b>	<b>84,700.00</b>	<b>85,300.00</b>
	<b>Location: 093</b>	<b>Plant &amp; Fixed-Plant Ops Summit</b>	<b>Total:</b>	<b>444,600.00</b>	<b>587,200.00</b>
	<b>Location: 094</b>	<b>Plant &amp; Fixed-Capital Outlay</b>	<b>Total:</b>	<b>50,000.00</b>	<b>170,000.00</b>
	<b>Location: 095</b>	<b>Transfers Out</b>	<b>Total:</b>	<b>115,100.00</b>	<b>115,100.00</b>

**Oakland Schools**  
**Annual Budgeting Amendment Report**  
 As of 3/10/2026

Location	Location Description	FY2026 Amendment	FY2027
<b>Fund: 200</b>	<b>Special Education Fund Total:</b>	<b>217,014,900.00</b>	<b>221,496,800.00</b>
<b>Type: 5</b>	<b>Expense Total:</b>	<b>217,014,900.00</b>	<b>221,496,800.00</b>

End of Report

**OAKLAND SCHOOLS SPECIAL EDUCATION  
FUNDED PROJECTS/GRANTS  
REVENUE AND EXPENDITURE BUDGET  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>	<b>FY TO FY % CHANGE</b>
<b>FUND 205</b>				
FUND EQUITY, BEGINNING OF YEAR				
Non-Spendable for Prepaids, Inventory, & Deposits	29,959	7,200	7,200	0.00%
Unassigned	(206,485)	(7,300)	(7,300)	0.00%
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>(176,526)</b>	<b>(100)</b>	<b>(100)</b>	<b>0.00%</b>
REVENUE				
State Sources	2,309,871	2,605,000	2,790,400	7.12%
Federal Sources	53,536,048	55,430,000	54,975,500	-0.82%
<b>TOTAL REVENUE</b>	<b>55,845,919</b>	<b>58,035,000</b>	<b>57,765,900</b>	<b>-0.46%</b>
<b>TOTAL REVENUE AND BEGINNING BALANCE</b>	<b>55,669,393</b>	<b>58,034,900</b>	<b>57,765,800</b>	<b>-0.46%</b>
EXPENDITURES				
Special Education - 12x	-	170,300	-	-100.00%
Support Services Pupil - 21x	4,227,037	4,751,400	4,778,200	0.56%
Support Services Instructional Staff - 22x	425,600	420,000	419,100	-0.21%
Support Services Central - 28x	729,761	752,000	772,900	2.78%
Community Activities - 33x	-	31,000	24,400	-21.29%
Non-Public School Pupils - 37x	949,007	2,650,200	2,946,900	11.20%
Payments to Other Public Schools - 41x	49,072,056	48,900,000	48,515,500	-0.79%
Fund Modifications (Other Operating Transfers Out) - 6xx	266,003	360,100	308,900	-14.22%
<b>TOTAL EXPENDITURES</b>	<b>55,669,464</b>	<b>58,035,000</b>	<b>57,765,900</b>	<b>-0.46%</b>
FUND EQUITY, END OF YEAR				
Non-Spendable for Prepaids, Inventory, & Deposits	7,275	7,200	7,200	0.00%
Unassigned	(7,346)	(7,300)	(7,300)	0.00%
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>(71)</b>	<b>(100)</b>	<b>(100)</b>	<b>0.00%</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>55,669,393</b>	<b>58,034,900</b>	<b>57,765,800</b>	<b>-0.46%</b>

**OAKLAND SCHOOLS  
SPECIAL EDUCATION FUND  
5-YEAR FORECAST**

	Actuals 2024-25	AM2 2025-26	Proposed 2026-27	Projection 2027-28	Projection 2028-29	Projection 2029-30	Projection 2030-31	Projection 2031-32
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**REVENUES:**

Local Revenues:								
Property tax revenue	188,838,055	197,835,800	204,562,200	210,085,400	215,547,600	221,151,800	226,901,700	232,801,100
Investment revenue	3,749,235	3,136,700	2,509,400	2,700,000	2,580,000	2,500,000	2,500,000	2,500,000
Fee based service revenues	105,140	70,000	70,000	70,000	70,000	70,000	70,000	70,000
State Revenues	8,057,349	7,143,300	6,880,100	6,980,500	7,039,100	7,099,700	7,162,200	7,226,800
State Pmt in Lieu of Taxes	2,077,524	2,288,200	2,288,200	2,288,200	2,288,200	2,288,200	2,288,200	2,288,200
Other Financing Sources	279,077	250,000	250,000	250,000	250,000	250,000	250,000	250,000
<b>TOTAL REVENUES</b>	<b>203,106,380</b>	<b>210,724,000</b>	<b>216,559,900</b>	<b>222,374,100</b>	<b>227,774,900</b>	<b>233,359,700</b>	<b>239,172,100</b>	<b>245,136,100</b>

**EXPENDITURES:**

Salaries/wages	10,862,423	11,736,400	12,728,000	13,148,000	13,581,900	14,030,100	14,493,100	14,971,400
Employee Benefits:								
FICA insurance	801,594	869,600	944,800	1,005,800	1,039,000	1,073,300	1,108,700	1,145,300
MPSERS retirement program costs	3,312,558	3,319,900	3,349,200	3,523,000	3,675,700	3,835,000	4,001,100	4,174,500
MPSERS Sec 147c & 147g	1,502,262	1,681,800	1,675,900	1,776,300	1,834,900	1,895,500	1,958,000	2,022,600
Healthcare insurance	1,426,294	1,478,500	1,646,100	1,711,900	1,780,400	1,851,600	1,925,700	2,002,700
Other employee insurances	407,239	443,600	500,300	525,300	551,600	579,200	608,200	638,600
Purchase Services	1,205,627	1,939,800	1,976,700	2,016,200	2,056,500	2,097,600	2,139,600	2,182,400
Supplies and Materials	191,402	304,200	347,100	357,500	368,200	379,200	390,600	402,300
Utilities	138,735	182,200	179,300	186,500	194,000	201,800	209,900	218,300
Capital Outlay	205,126	94,300	378,500	378,500	378,500	378,500	378,500	378,500
Dues/Fees/Leases	420,270	554,900	562,500	573,800	585,300	597,000	608,900	621,100
Property tax abatement & delinquency WO	270,053	491,100	511,400	525,200	538,900	552,900	567,300	582,000
PA-18 base distribution	173,594,489	183,872,500	189,106,200	194,028,200	198,582,100	203,278,700	208,171,400	213,183,800
PA-18 additional distribution	5,600,000	6,911,600	-	-	-	-	-	-
Operating Transfers - Oxford capital	-	556,800	5,009,100	-	-	-	-	-
Transfers to LEAs - other support	1,216,682	2,462,600	2,466,600	2,450,000	2,450,000	2,450,000	2,450,000	2,450,000
Transfer Out - SRF	19,100	19,100	19,100	19,100	19,100	19,100	19,100	19,100
Transfer Out - QSCB	98,200	-	-	-	-	-	-	-
Transfer Out - CP FUND 406:	96,000	96,000	96,000	96,000	96,000	96,000	96,000	96,000
<b>TOTAL EXPENDITURES</b>	<b>201,368,054</b>	<b>217,014,900</b>	<b>221,496,800</b>	<b>222,321,300</b>	<b>227,732,100</b>	<b>233,315,500</b>	<b>239,126,100</b>	<b>245,088,600</b>

**OPERATING EXCESS (DEFICIT):**

	1,738,326	(6,290,900)	(4,936,900)	52,800	42,800	44,200	46,000	47,500
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**OAKLAND SCHOOLS  
SPECIAL EDUCATION FUND  
5-YEAR FORECAST**

	<b>Actuals 2024-25</b>	<b>AM2 2025-26</b>	<b>Proposed 2026-27</b>	<b>Projection 2027-28</b>	<b>Projection 2028-29</b>	<b>Projection 2029-30</b>	<b>Projection 2030-31</b>	<b>Projection 2031-32</b>
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**FUND BALANCES:**

Beginning of Year:	26,702,185	28,440,500	22,149,600	17,212,700	17,265,500	17,308,300	17,352,500	17,398,500
Restricted-SE Ctr Renovation	20,000,000	21,500,000	20,943,200	15,934,100	15,934,100	15,934,100	15,934,100	15,934,100
Nonspendable	41,729	39,200	39,200	39,200	39,200	39,200	39,200	39,200
Restricted-Special Education	6,660,456	6,901,300	1,167,200	1,239,400	1,292,200	1,335,000	1,379,200	1,425,200
End of Year:	28,440,511	22,149,600	17,212,700	17,265,500	17,308,300	17,352,500	17,398,500	17,446,000
Restricted-SE Ctr Renovation	21,500,000	20,943,200	15,934,100	15,934,100	15,934,100	15,934,100	15,934,100	15,934,100
Nonspendable	39,197	39,200	39,200	39,200	39,200	39,200	39,200	39,200
Restricted-Special Education	6,901,314	1,167,200	1,239,400	1,292,200	1,335,000	1,379,200	1,425,200	1,472,700

End of Year Restricted FB as % of Exp net of LEA Transfers

32.9%      5.0%      5.0%      5.0%      5.0%      5.0%      5.0%



# **Career Focused Education Fund Original Budget and Five-Year Forecast**

*Fiscal Year 2026-27*

## CAREER FOCUSED EDUCATION FUND SPECIFIC ANALYSIS

### FUND OVERVIEW

The Oakland Schools Career Focused Education Fund is projected to have a FY 2026-27 year-end restricted fund balance (at the time of this printing) of \$8,329,300. Anticipated ending fund balances for FY 2025-26 and 2026-27 are detailed in the schedule below:

	FY 2025-26 Amend 2 Budget	FY 2026-27 Budget
Non-Spendable - Prepaids	\$ 43,000	\$ 43,000
Restricted	7,946,600	8,329,300
<b>Total Budgeted Ending Fund Balance</b>	<b>\$ 7,989,600</b>	<b>\$ 8,372,300</b>

FY 2026-27 revenue is projected to be \$57.9 million:

- Property taxes - \$50.0 million (86% of total revenue)
- Other local revenues - \$1.5 million
- State Source revenues - \$6.3 million
- Other Financing Source revenues - <\$ 0.1 million

FY 2026-27 expenditures are projected to be \$57.5 million:

- Campus Operations - \$24.6 million
- District & Campus Support Operations - \$4.9 million
- LEA Transfers & Program Subsidies - \$6.3 million
- Plant & Fixed Charges - \$21.7 million

In compliance with Public Act 451 of 1976, MCL section 380.684, as amended by Public Act 45 of 2007, the following career and technical education programs are operated by the ISD and submitted for review in the Career Focused Education Fund Budget:

<u>State Program Code</u>	<u>State Program Name</u>
501	Agriculture, Agricultural Operations and Related Sciences
510	Marketing Sales and Service
523	Cooking and Related Culinary Arts
524	Education General
531	Cosmetology
538	Public Safety/Protective Services
540	Construction Trades
541	Line Worker
548	Cyber Security
549	Collision Repair Technician (NATEF Certified)
550	Automobile Technician (NATEF Certified)
551	Medium/Heavy Truck Technician (NATEF Certified)
562	Graphics and Printing Technology and Communications
564	Machine Tool Technology/Machinist
566	Welding, Brazing, and Soldering
575	Mechatronics
580	Therapeutic Services
595	Computer Programming/Programmer

## **PROGRAM AND PERSONNEL**

The Career Focused Education (CFE) Fund budget provides leadership and support for a countywide K-12 Career Readiness System that guides students in making informed decisions about their career. The purpose of this funding is as follows:

- The CFE fund is directly responsible for operating four Oakland Schools Technical Campuses; promoting continuous improvement through quality initiatives; aligning instruction and curriculum with the Career Pathways and coordinating career development initiatives across Oakland County's 28 public school districts.
- K-12 Career Readiness Unit leads and coordinates career awareness, exploration, and preparation initiatives via direct services and indirect services to the 28 local districts. They oversee state and federal funding in Oakland County for career and technical education in local districts and OSTC campuses. They provide Education Development Plan (EDP) support and other career readiness resources as well. They create and support regional and local career readiness activities, events, and professional learning for students, parents, and educators.
- The CFE fund develops and coordinates models of teaching and learning for Career Technical Education (CTE), and oversees curriculum development, district coordination and accountability, online and electronic learning resources, Career Readiness summer offerings, integration of emerging technologies into career, post-secondary credit opportunities, business and community partnerships, support career and technical student organization competitions (CTSO), work-based learning opportunities, regional advisory committees, staff development, instruction and assessment.

In FY 2026-27 CTE staffing remains consistent. Details of other personnel changes can be found in the Enterprise Wide Executive Summary & Budget Assumptions under Staffing Changes.

### **Revenue**

The below represent significant assumptions and items of interest in the 2026-27 revenue budgets:

- Property taxes have been budgeted to increase by 3.4% based on our projections and supported by those of the Oakland County Equalization Division.
- Interest revenue is projected to decrease due to the uncertain economic forecast.
- State source revenue is held flat for FY 2026-27 pending a new state aid budget, with the exception of MPERS categorical revenue. The District has adjusted the various MPERS categoricals based on the most recent information available at the time of printing of this document.
- Other Financing Source revenues, which consist of indirect revenue on grants, interfund transfers and funding from Wayne RESA for Section 107 Adult Education compliance and monitoring, are projected to remain consistent from 2025-26 to 2026-27 with the exception of operating transfers. In 2025-26, a one-time transfer from the General Education Fund totaling \$1 million was made to fund future STEMi operations. This transfer is not in the 2026-27 budget. Indirect revenue is directly correlated to direct grant spending and fluctuates annually based on the timing of expenditures.

### **Expenditures**

- Campus program operations and their budgets have been aligned to meet the enrollment needs and maximize program offerings.
- Salary and benefit budgets were forecasted in fiscal year 2026-27 to reflect a 2.0% across-the-board salary increase for all staff, plus step increases for staff not on the top step of their respective salary schedule. All salary changes for union staff are subject to collective bargaining. The current collective bargaining agreement expires June 30, 2027. Budgets for 2026-27 assume all staff

positions are filled for the entire fiscal year with no vacancies, whereas 2025-26 budgets have been adjusted for unfilled positions and vacancies through March 2026.

- Property Tax abatements reflect a budget of .25% of the property tax revenue budget to address the Michigan Tax Tribunal unsettled claims.

Additional variances are included on the footnote pages.

## **FIVE-YEAR FORECAST OVERVIEW**

Following the Career-Focused Education Fund (CFEF) budget, is the CFEF five-year operating forecast model. Significant assumptions utilized in the model are identified below:

### **REVENUE**

- Property tax revenues drive the revenue budget. Oakland Schools' property tax collection rate has been historically very high and stable. Oakland Schools utilizes projections obtained from Oakland County Equalization to create our taxable value forecasts. Based on the expectation of growth of the real-estate market, offset by the possibility of a Headlee rollback, property taxes are forecasted to increase by the following percentages:
  - 2027-28 2.7%
  - 2028-29 through 2031-32 2.6%
- The investment revenue forecast model uses a formula to generate the expected revenue figures for each fiscal year period based on projected cash flows and expected rate of return. The factors relied upon in this forecast for a reduction in investment income are based on economic uncertainty and the potential for another recession. All investments are managed within the district's investment policy and state law. The current state of economic affairs as of March 2026 makes investment income uncertain. The District will continue to monitor investment returns and modify forecasts as deemed necessary on an ongoing basis.
- Miscellaneous and other revenues are projected to remain flat through the balance of the forecast.
- State source revenues of \$5.8 million in 2026-27 for the Career Focused Education Fund are comprised primarily of Section 61 and MPSERS Sec 147 funds. Section 61 funds are projected to remain flat for the duration of the five-year forecast model. MPSERS 147c(1) revenues within State Revenues are projected to increase correspondingly to the expenditure increase for the same item, as 147c(1) is revenue/expenditure neutral. The final significant component of state source revenues is State Payment in Lieu of Taxes which represents reimbursement to the organization for personal property tax losses by the Local Community Stabilization Authority.
- Other Financing Sources revenue are projected to remain flat for the duration of the forecast.

### **EXPENDITURES**

- This fund's forecast utilizes two salary/wage growth rate assumptions. The first rate is representative of the fund's non-union personnel. Oakland Schools' non-union personnel salary and wage cycle is fiscal year based with regards to step movement and salary schedule increases, when applicable. The forecast includes a salary/growth rate of 1.3%, which would be indicative of step movement from year to year.

The union wage assumption rate is also fiscal year based. The rate is comprised of an average of .89% for step increases as based on the current union contract.

The forecast includes a 2% increase in base wages for every year of the forecast.

- The FICA rate is 7.65%. This rate is multiplied by the wage base (social security rate of 6.2% applied to individuals wages up to \$184,500 for calendar year 2026) to produce the FICA costs for the year.
- There are 8 different retirement rates for school district employees, based on their hire date and/or their personal choice for retirement benefits.

The rates that are effective from October 1, 2025 through September 30, 2026 are:

	Basic/MIP with Premium Subsidy	Pension Plus with Premium Subsidy	Pension Plus PHF	Pension Plus to DC with PHF	Basic/MIP to DC with Premium Subsidy	Basic/MIP to DC with PHF	Basic/MIP with PHF	Pension Plus 2
Rate Chgd on Reported Payroll	29.91%	25.17%	21.34%	15.21%	19.04%	15.21%	26.08%	21.41%
MPSERS UAAL Stabilization Rate	15.02%	15.02%	15.02%	15.02%	15.02%	15.02%	15.02%	15.02%
Subtotal	44.93%	40.19%	36.36%	30.23%	34.06%	30.23%	41.10%	36.43%
DC Employer Mandatory	0.00%	0.00%	0.00%	4.00%	4.00%	4.00%	0.00%	0.00%
DC Employer Match	0.00%	1.00%	1.00%	3.00%	3.00%	3.00%	0.00%	1.00%
Personal Healthcare Fund (PHF)	0.00%	0.00%	2.00%	2.00%	0.00%	2.00%	2.00%	2.00%
<b>Total Rate Charged</b>	<b>44.93%</b>	<b>41.19%</b>	<b>39.36%</b>	<b>39.23%</b>	<b>41.06%</b>	<b>39.23%</b>	<b>43.10%</b>	<b>39.43%</b>

The forecasted rates for October 1, 2026 through September 30, 2027 contained in the Governor’s proposed FY27 budget are:

	Basic/MIP with Premium Subsidy	Pension Plus with Premium Subsidy	Pension Plus PHF	Pension Plus to DC with PHF	Basic/MIP to DC with Premium Subsidy	Basic/MIP to DC with PHF	Basic/MIP with PHF	Pension Plus 2
Rate Chgd on Reported Payroll	27.51%	22.77%	21.34%	15.21%	16.64%	15.21%	26.08%	21.41%
MPSERS UAAL Stabilization Rate	13.51%	13.51%	13.51%	13.51%	13.51%	13.51%	13.51%	13.51%
Subtotal	41.02%	36.28%	34.85%	28.72%	30.15%	28.72%	39.59%	34.92%
DC Employer Mandatory	0.00%	0.00%	0.00%	4.00%	4.00%	4.00%	0.00%	0.00%
DC Employer Match	0.00%	1.00%	1.00%	3.00%	3.00%	3.00%	0.00%	1.00%
Personal Healthcare Fund (PHF)	0.00%	0.00%	2.00%	2.00%	0.00%	2.00%	2.00%	2.00%
<b>Total Rate Charged</b>	<b>41.02%</b>	<b>37.28%</b>	<b>37.85%</b>	<b>37.72%</b>	<b>37.15%</b>	<b>37.72%</b>	<b>41.59%</b>	<b>37.92%</b>

In order to project a budgeted rate overall for Oakland Schools for 2026-27, an analysis of how many employees we have on each of these plans was studied. A blended rate, exclusive of UAAL, for budgeting retirement costs for 2026-27 has been established at 26.53%. The blended rate exclusive of UAAL has been projected for the duration of the five-year forecast at a 1.0% rate of increase annually.

- The district provides health insurance to employees, adopting the “hard cap” on the dollar limits the district may pay for health insurance due to legislative mandates and district implementation choice. Future increases to the employer hard cap limits are subject to the medical consumer price index, which the district has no jurisdiction over. The forecast assumes an annual growth rate of 4.0% in the medical CPI for all five years of the forecast.

- Purchased services accounts are forecasted to increase 2% for all years of the forecast due to inflation and contain other year-to-year adjustments as necessary. In 2023-24, the district received funding for partial reimbursement of a School Resource Officer (SRO) through a Michigan State Police grant, with the balance funded through local revenues. The district has an arrangement with the Oakland County Sheriff's Department to provide one SRO for each of the four technical campuses. Beginning August 1, 2026, all SRO's will be 100% funded through local revenues.
- Supply and material budgets as well as dues and fees are projected to grow by 2-3% for the duration of the forecast.
- The Capital Outlay budget agrees to the Oakland Schools 5-year Capital Outlay Plan that is being presented to the School Board for first reading on April 1, 2025. Budgeted expenditures for instructional capital, I.T. refresh capital and facilities non-instructional capital fluctuate annually based on refresh cycles.

In addition, there are funds budgeted in the Campus Capital Projects Fund 404 for additional capital outlay needs. Operating transfers are budgeted to be made from the CFE Fund to the Campus Capital Projects Fund for renovation projects currently underway. Additional details can be found in the enterprise-wide executive summary.

- The Campus Renovations Debt Service obligations are funded by the related Debt Service Fund 311. To the extent possible, transfers out from the CFEF fund into debt service are established in the forecast. The forecast contains transfers out to debt service of \$2.0 - \$3.3 million annually from 2026-27 through 2030-32.

The annual debt service payments are \$2.5 million through 2036 under the existing debt service schedule. At the time of the printing of this document, the District is in the process of doing a partial refunding of the 2016 Refunding Bonds. As it is too early to budget for the impact of the refunding, the budgets will be amended in the first budget amendment of 2026-27, after the refunding is complete

- The property tax abatement budget is set at .25% of budgeted annual property tax revenue for all years of this forecast.
- Regional Programs consist of resource allocations designed to meet countywide regional plan priorities. Budgets also include early college/dual enrollment for students attending the Oakland Schools Technical Campuses and costs for students to obtain regional certifications or attend CTE competitions. Total funding for these programs is \$4.5 - \$4.6 million annually throughout the entire forecast.
- All years of the forecast include \$550,000 for lease and operating costs for the STEM mobile classroom.
- The Transportation Reimbursement Transfer to LEAs is set at \$1.8 million annually throughout the forecast.

**FUND BALANCE**

The forecast shows an estimated restricted fund balance of the following levels:

2027-28	\$9.4 million	16.1%
2028-29	\$10.2 million	17.0%
2029-30	\$11.0 million	18.0%
2030-31	\$12.1 million	19.5%
2031-32	\$12.7 million	19.7%

**OAKLAND SCHOOLS CAREER FOCUSED EDUCATION FUND  
REVENUE AND EXPENDITURE BUDGET  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>	<b>NOTES</b>	<b>FY TO FY % CHANGE</b>
FUND EQUITY, BEGINNING OF YEAR					
Non-Spendable for Prepaids, Inventory, & Deposits	29,088	43,000	43,000		0.00%
Restricted - Career Focused Education	8,159,759	8,495,600	7,946,600		-6.46%
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>8,188,847</b>	<b>8,538,600</b>	<b>7,989,600</b>		<b>-6.43%</b>
REVENUE					
LOCAL SOURCES					
Property Taxes	46,189,355	48,379,700	50,024,600	A	3.40%
Earnings on Investments	1,285,854	1,220,000	976,000	B	-20.00%
Early College Tution - District	348,253	445,000	445,000		0.00%
Oakland County Competitive Robotics Association	7,400	6,500	6,500		0.00%
Program Revenue	105,342	68,800	68,800		0.00%
Workshop Revenue	4,362	10,000	10,000		0.00%
Miscellaneous Revenue	20,803	50,000	10,000		-80.00%
<b>TOTAL LOCAL SOURCES</b>	<b>47,961,369</b>	<b>50,180,000</b>	<b>51,540,900</b>		<b>2.71%</b>
STATE SOURCES					
Voc Ed Sec 61a.1	1,729,845	1,759,200	1,759,200		0.00%
Voc Ed Administration Sec 61a.2	14,193	14,200	14,200		0.00%
CTE Early/Middle College Programs 61b	198,974	370,400	370,400		0.00%
Section 147a(2) MPSERS Normal Cost Offset	666,107	783,200	699,300	C	-10.71%
Section 147a(3) MPSERS Cost Offset ISDs & Districts	186,321	-	-		0.00%
Section 147a(4) MPSERS Cost Offset - Reduced UAAL	986,649	-	-		0.00%
Section 147c(1) MPSERS UAAL Rate Stabilization	1,814,656	2,519,700	2,619,500		3.96%
Section 147c(2) MPSERS One Time Deposit	412,479	-	-		0.00%
Section 147e MPSERS Employer DC Match	89,772	103,400	103,400		0.00%
Section 147g MPSERS 3% Healthcare Reimbursement	311,579	-	-		0.00%
Section 27L4 Healthcare Offset	-	233,600	-	D	-100.00%
MPSERS DC Credit	38,503	63,800	63,800		0.00%
Section 26.a Renaissance Zone	4,932	4,900	4,900		0.00%
Section 26d Brownfield Redevelopment Reimbursement	230,324	148,800	148,800		0.00%
State Payment in Lieu of Taxes	508,156	512,300	512,300		0.00%
State Payment in Lieu of Taxes - SBTE	-	47,400	47,400		0.00%
<b>TOTAL STATE SOURCES</b>	<b>7,192,490</b>	<b>6,560,900</b>	<b>6,343,200</b>		<b>-3.32%</b>
OTHER FINANCING SOURCES					
Sec 107 Adult Ed - Wayne RESA	25,580	25,000	25,000		0.00%
Proceeds from Sale of Capital Assets	40,600	-	-		0.00%
Transfer from GEF	-	1,000,000	-	E	-100.00%
Indirect Revenue	13,075	13,000	13,000		0.00%
<b>TOTAL OTHER FINANCING SOURCES</b>	<b>79,255</b>	<b>1,038,000</b>	<b>38,000</b>		<b>-96.34%</b>
<b>TOTAL REVENUE</b>	<b>55,233,114</b>	<b>57,778,900</b>	<b>57,922,100</b>		<b>0.25%</b>
<b>TOTAL REVENUE AND BEGINNING FUND BALANCE</b>	<b>63,421,961</b>	<b>66,317,500</b>	<b>65,911,700</b>		<b>-0.61%</b>
EXPENDITURE SUMMARY					
Campus Operations	23,373,989	24,434,100	24,599,500		0.68%
District & Campus Support Operations	3,656,051	4,535,700	4,954,100		9.22%
LEA Transfers & Program Subsidies	5,633,390	6,274,000	6,264,000		-0.16%
Plant & Fixed Charges	22,219,936	23,084,100	21,721,800		-5.90%
<b>TOTAL EXPENDITURES</b>	<b>54,883,366</b>	<b>58,327,900</b>	<b>57,539,400</b>		<b>-1.35%</b>
Operating Surplus/(Deficit)	349,748	(549,000)	382,700		-169.71%
FUND EQUITY, END OF YEAR					
Non-Spendable for Prepaids, Inventory, & Deposits	43,004	43,000	43,000		0.00%
Restricted - Career Focused Education	8,495,591	7,946,600	8,329,300		4.82%
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>8,538,595</b>	<b>7,989,600</b>	<b>8,372,300</b>		<b>4.79%</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>63,421,961</b>	<b>66,317,500</b>	<b>65,911,700</b>		<b>-0.61%</b>

**OAKLAND SCHOOLS CAREER FOCUSED EDUCATION FUND  
EXPENDITURE BUDGET SUMMARY  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>	<b>NOTES</b>	<b>FY TO FY % CHANGE</b>
<b>CAMPUS OPERATIONS</b>					
<b>NW CAMPUS OPERATIONS</b>					
056 NORTHWEST CAMPUS - Office of the Principal 241	666,500	717,500	713,800		-0.52%
NORTHWEST CAMPUS - Extended Day & Summer School 127	203,979	198,700	215,800		8.61%
NORTHWEST CAMPUS - Counseling 212	267,129	216,100	208,300		-3.61%
NORTHWEST CAMPUS - Social Work 216	182,315	279,100	310,500		11.25%
NORTHWEST CAMPUS - Custodial 261	527,804	538,600	552,700		2.62%
NORTHWEST CAMPUS - Security 266	237,829	234,900	235,400		0.21%
NORTHWEST CAMPUS - Transportation 271	22,843	26,800	26,800		0.00%
NORTHWEST CAMPUS - Technical Support 284	119,727	129,000	123,200		-4.50%
NORTHWEST CAMPUS - Academic Support 0524	276,241	295,000	313,100		6.14%
Agricultural Operations 0501	411,759	434,900	430,200		-1.08%
Marketing, Sales, & Services 0510	183,442	186,100	186,300		0.11%
Culinary Services 0523	261,503	345,500	337,600		-2.29%
Construction Trades 0540	210,778	232,100	240,500		3.62%
Building Maintenance 0541	183,790	192,000	192,800		0.42%
Collision Repair 0549	218,282	225,600	224,900		-0.31%
Automobile Technician 0550	239,572	263,100	264,100		0.38%
Graphics Communications 0562	160,362	164,000	153,100		-6.65%
Mechatronics 0575	172,217	190,500	192,100		0.84%
Health Sciences 0580	399,271	409,100	409,500		0.10%
	4,945,343	5,278,600	5,330,700		0.99%
F56 NORTHWEST CAMPUS - Facilities	455,471	436,000	430,700		-1.22%
056 NW CAMPUS TOTAL	5,400,814	5,714,600	5,761,400		0.82%
<b>SE CAMPUS OPERATIONS</b>					
057 SOUTHEAST CAMPUS - Office of the Principal 241	578,505	662,100	690,800		4.33%
SOUTHEAST CAMPUS - Extended Day & Summer School 127	255,273	226,000	234,100		3.58%
SOUTHEAST CAMPUS - Counseling 212	231,279	250,400	230,100		-8.11%
SOUTHEAST CAMPUS - Social Work 216	176,120	170,200	171,100		0.53%
SOUTHEAST CAMPUS - Custodial 261	629,861	626,300	633,600		1.17%
SOUTHEAST CAMPUS - Security 266	255,932	238,200	235,000		-1.34%
SOUTHEAST CAMPUS - Transportation 271	20,018	18,600	21,600		16.13%
SOUTHEAST CAMPUS - Technical Support 284	119,177	126,400	123,100		-2.61%
SOUTHEAST CAMPUS - Academic Support 0524	311,055	329,100	338,500		2.86%
Marketing, Sales, & Services 0510	148,154	160,700	161,800		0.68%
Culinary Services 0523	414,918	422,100	425,300		0.76%
Public Safety 0538	136,790	161,600	147,800		-8.54%
Construction Trades 0540	242,050	250,400	245,500		-1.96%
Building Maintenance 0541	135,088	137,000	149,100		8.83%
Cyber Security 0548	109,542	122,000	122,700		0.57%
Collision Repair 0549	172,715	182,800	191,800		4.92%
Automobile Technician 0550	242,430	254,000	254,600		0.24%
Graphics Communications 0562	155,210	155,500	122,400		-21.29%
Welding, Brazing, & Soldering 0566	139,245	145,900	151,900		4.11%
Mechatronics 0575	247,285	192,000	194,300		1.20%
Health Sciences 0580	488,457	513,500	486,200		-5.32%
Computer Programming/Programmer 0595	176,861	179,200	181,300		1.17%
	5,385,965	5,524,000	5,512,600		-0.21%
F57 SOUTHEAST CAMPUS - Facilities	411,209	427,800	415,600		-2.85%
057 SE CAMPUS TOTAL	5,797,174	5,951,800	5,928,200		-0.40%
<b>NE CAMPUS OPERATIONS</b>					
058 NORTHEAST CAMPUS - Office Of The Principal 241	675,108	713,000	705,400		-1.07%
NORTHEAST CAMPUS - Extended Day & Summer School 127	395,020	305,600	317,100		3.76%
NORTHEAST CAMPUS - Counseling 212	245,924	238,800	236,800		-0.84%
NORTHEAST CAMPUS - Social Work 216	238,489	304,200	289,600		-4.80%
NORTHEAST CAMPUS - Custodial 261	520,147	554,200	569,100		2.69%
NORTHEAST CAMPUS - Security 266	328,044	323,700	327,800		1.27%
NORTHEAST CAMPUS - Transportation 271	42,811	33,000	39,300		19.09%
NORTHEAST CAMPUS - Technical Support 284	110,570	133,100	130,300		-2.10%
NORTHEAST CAMPUS - Academic Support 0524	293,166	305,800	315,800		3.27%
Marketing, Sales, & Services 0510	164,991	159,700	162,400		1.69%
Culinary Services 0523	448,795	420,900	426,100		1.24%

**OAKLAND SCHOOLS CAREER FOCUSED EDUCATION FUND  
EXPENDITURE BUDGET SUMMARY  
FISCAL YEAR 2026-27**

	FY 2025 ACTUAL	FY 2026 AMENDMENT 2 TOTALS	FY 2027 PROPOSED BUDGET	NOTES	FY TO FY % CHANGE
Cosmotology 0531	691,598	779,200	803,000		3.05%
Construction Trades 0540	428,295	437,300	455,000		4.05%
Collision Repair 0549	182,906	188,400	196,000		4.03%
Automobile Technician 0550	198,028	207,200	215,000		3.76%
Machine Tool Technology 0564	150,342	151,600	152,900		0.86%
Welding, Brazing, & Soldering 0566	193,838	208,000	206,600		-0.67%
Mechatronics 0575	185,647	193,900	195,500		0.83%
Health Sciences 0580	370,813	391,800	395,600		0.97%
Computer Programming/Programmer 0595	180,718	155,200	165,600		6.70%
	6,045,250	6,204,600	6,304,900		1.62%
F58 NORTHEAST CAMPUS - Facilities	446,778	402,900	417,800		3.70%
058 NE CAMPUS TOTAL	6,492,028	6,607,500	6,722,700		1.74%
<b>SW CAMPUS OPERATIONS</b>					
059 SOUTHWEST CAMPUS - Office Of The Principal 241	564,071	673,200	698,000		3.68%
SOUTHWEST CAMPUS - Extended Day & Summer School 127	189,955	220,000	230,300		4.68%
SOUTHWEST CAMPUS - Counseling 212	238,561	237,900	224,700		-5.55%
SOUTHWEST CAMPUS - Social Work 216	155,401	154,500	155,500		0.65%
SOUTHWEST CAMPUS - Custodial 261	480,426	557,600	568,100		1.88%
SOUTHWEST CAMPUS - Security 266	177,974	175,300	176,300		0.57%
SOUTHWEST CAMPUS - Transportation 271	17,505	11,000	11,000		0.00%
SOUTHWEST CAMPUS - Technical Support 284	122,742	128,700	125,300		-2.64%
SOUTHWEST CAMPUS - Academic Support 0524	312,960	323,200	324,400		0.37%
Agricultural Operations 0501	254,397	266,200	266,800		0.23%
Marketing, Sales, & Services 0510	158,652	178,200	179,400		0.67%
Culinary Services 0523	413,164	429,900	431,000		0.26%
Cyber Security 0548	173,203	158,800	121,800		-23.30%
Collision Repair 0549	250,856	265,400	265,100		-0.11%
Automobile Technician 0550	244,898	265,800	261,900		-1.47%
Medium & Heavy Truck Technology 0551	193,978	205,000	228,600		11.51%
Graphics Communicatons 0562	214,521	220,000	223,200		1.45%
Welding, Brazing, & Soldering 0566	172,959	226,600	225,500		-0.49%
Mechatronics 0575	249,283	255,400	243,000		-4.86%
Health Sciences 0580	579,533	644,400	677,000		5.06%
Computer Programming/Programmer 0595	157,423	162,900	164,000		0.68%
	5,322,462	5,760,000	5,800,900		0.71%
F59 SOUTHWEST CAMPUS - Facilities	361,511	400,200	386,300		-3.47%
059 SW CAMPUS TOTAL	5,683,973	6,160,200	6,187,200		0.44%
<b>TOTAL CAMPUS OPERATIONS</b>	<b>23,373,989</b>	<b>24,434,100</b>	<b>24,599,500</b>		<b>0.68%</b>
<b>DISTRICT AND CAMPUS SUPPORT OPERATIONS</b>					
018 Workshop Budget	7,500	16,800	16,800		0.00%
051 Early College	521,672	562,400	562,400		0.00%
055 District & Campus Support - Instructional Services 127	35,186	136,800	136,800		0.00%
055 District & Campus Support - Counseling 212	553	6,000	6,000		0.00%
055 District & Campus Support - Improvement of Instruction 221	2,024,772	2,445,600	2,871,300	F	17.41%
055 District & Campus Support - Supervision & Direction 226	422,488	448,400	446,200		-0.49%
055 District & Campus Support - Academic Support 227	17,045	120,000	120,000		0.00%
055 District & Campus Support - Transportation 271	1,020	7,000	7,000		0.00%
055 District & Campus Support - Personnel Services 283	4,071	40,000	40,000		0.00%
055 District & Campus Support - Technology Support 284	170,620	248,300	248,300		0.00%
062 STEMi Operational Budget	451,124	504,400	499,300		-1.01%
<b>TOTAL DISTRICT AND CAMPUS SUPPORT OPERATIONS</b>	<b>3,656,051</b>	<b>4,535,700</b>	<b>4,954,100</b>		<b>9.22%</b>
<b>LEA TRANSFERS AND PROGRAM SUBSIDIES</b>					
061 LEA Transportation Support	1,800,000	1,800,000	1,800,000		0.00%
063 LEA Career Readiness Allocation	3,484,246	3,678,100	3,678,100		0.00%
063 LEA Career Readiness - OCCRA 0574	66,355	97,600	112,600		15.37%
064 LEA Career Readiness - Camps	68,992	100,000	100,000		0.00%
065 LEA Career Readiness - STEM	162,185	134,500	131,300		-2.38%
066 LEA Career Readiness - NAIS	51,612	463,800	442,000		-4.70%
<b>TOTAL LEA TRANSFERS AND PROGRAM SUBSIDIES</b>	<b>5,633,390</b>	<b>6,274,000</b>	<b>6,264,000</b>		<b>-0.16%</b>

**OAKLAND SCHOOLS CAREER FOCUSED EDUCATION FUND  
EXPENDITURE BUDGET SUMMARY  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>	<b>NOTES</b>	<b>FY TO FY % CHANGE</b>
PLANT AND FIXED CHARGES					
011 Property Tax Adjustments & Fees	103,734	160,500	166,700		3.86%
091 Facility Operations	286,349	278,800	301,800		8.25%
092 Telephone	53,235	62,900	63,200		0.48%
094 Capital Outlay	199,660	50,000	50,000		0.00%
095 Operating Transfers Out	13,338,200	13,523,100	12,223,100	G	-9.61%
General Allocation	8,238,758	9,008,800	8,917,000		-1.02%
<b>TOTAL PLANT AND FIXED CHARGES</b>	<b>22,219,936</b>	<b>23,084,100</b>	<b>21,721,800</b>		<b>-5.90%</b>
<b>TOTAL EXPENDITURES</b>	<b>54,883,366</b>	<b>58,327,900</b>	<b>57,539,400</b>		<b>-1.35%</b>

**OAKLAND SCHOOLS GENERAL EDUCATION FUND**

**FOOTNOTES**

**FISCAL YEAR 2026-2027**

**FOOTNOTES: Highlighting line items that are +/-25% and/or +/- \$100K from last year**

- A The 3.4% increase in Property Tax Revenue reflects the tax base growth and its impact on the District's property tax revenues as forecasted by the Oakland County Equalization Department.
- B The decrease in Interest on Investments is a conservative projection due to forecasted economic uncertainties.
- C 2025-26 includes a one-time adjustment that is removed in FY27.
- D 2025-26 includes a one-time adjustment that is removed in FY27.
- E 2025-26 includes a one-time transfer from the General Education Fund this is removed in FY27.
- F 2026-27 includes the addition of a 1.0 FTE Career Readiness Coordinator.
- G Operating Transfers Out consist primarily of transfers to the Capital Projects Funds. Transfers fluctuate annually based on need and available resources.

# Oakland Schools

## Annual Budgeting Amendment Report

As of 3/10/2026

	Function	Location Description	FY2026 Amendment	FY2027
<b>Type: 4 Revenue</b>				
	<b>Fund: 600</b>	Vocational Ed Fund		
	<b>Function: 000</b>	Not Applicable		
	<b>Function: 000</b>	Not Applicable	<b>Total:</b>	
	<b>Fund: 600</b>	Vocational Ed Fund	<b>Total:</b>	
	<b>Type: 4</b>	Revenue	<b>Total:</b>	
			57,778,900.00	57,922,100.00
			57,778,900.00	57,922,100.00
			57,778,900.00	57,922,100.00
<b>Type: 5 Expense</b>				
	<b>Fund: 600</b>	Vocational Ed Fund		
	<b>Function: 127</b>	Career & Technical		
	<b>Function: 127</b>	Career & Technical	<b>Total:</b>	
			17,494,600.00	17,645,000.00
	<b>Function: 211</b>	Truancy/Absenteeism Services		
	<b>Function: 211</b>	Truancy/Absenteeism Services	<b>Total:</b>	
			130,500.00	130,000.00
	<b>Function: 212</b>	Guidance Services		
	<b>Function: 212</b>	Guidance Services	<b>Total:</b>	
			1,420,200.00	1,376,900.00
	<b>Function: 216</b>	Social Work Services		
	<b>Function: 216</b>	Social Work Services	<b>Total:</b>	
			908,000.00	926,700.00
	<b>Function: 221</b>	Improve of Instruction		
	<b>Function: 221</b>	Improve of Instruction	<b>Total:</b>	
			3,266,800.00	3,678,300.00
	<b>Function: 225</b>	Technology Assisted Instructn		
	<b>Function: 225</b>	Technology Assisted Instructn	<b>Total:</b>	
			137,000.00	132,300.00
	<b>Function: 226</b>	Supv/Dir Instr Staff		
	<b>Function: 226</b>	Supv/Dir Instr Staff	<b>Total:</b>	
			477,800.00	476,800.00
	<b>Function: 227</b>	Academic Student Assessment		
	<b>Function: 227</b>	Academic Student Assessment	<b>Total:</b>	
			120,000.00	120,000.00
	<b>Function: 231</b>	Board of Education		
	<b>Function: 231</b>	Board of Education	<b>Total:</b>	
			267,900.00	267,800.00
	<b>Function: 232</b>	Exec Administration		
	<b>Function: 232</b>	Exec Administration	<b>Total:</b>	
			982,400.00	993,100.00
	<b>Function: 241</b>	Principal Office		
	<b>Function: 241</b>	Principal Office	<b>Total:</b>	
			2,765,800.00	2,808,000.00
	<b>Function: 252</b>	Fiscal Services		
	<b>Function: 252</b>	Fiscal Services	<b>Total:</b>	
			1,309,500.00	1,320,600.00
	<b>Function: 257</b>	Internal Services		
	<b>Function: 257</b>	Internal Services	<b>Total:</b>	
			162,800.00	184,600.00
	<b>Function: 259</b>	Oth Business Svcs		
	<b>Function: 259</b>	Oth Business Svcs	<b>Total:</b>	
			178,600.00	185,100.00
	<b>Function: 261</b>	Oper Bldg Svcs		
	<b>Function: 261</b>	Oper Bldg Svcs	<b>Total:</b>	
			4,345,100.00	4,398,300.00
	<b>Function: 266</b>	Security Services		
	<b>Function: 266</b>	Security Services	<b>Total:</b>	
			987,000.00	989,400.00
	<b>Function: 271</b>	Pupil Transportation Services		
	<b>Function: 271</b>	Pupil Transportation Services	<b>Total:</b>	
			150,500.00	160,000.00
	<b>Function: 281</b>	Plan, Research, Dev and Eval		
	<b>Function: 281</b>	Plan, Research, Dev and Eval	<b>Total:</b>	
			256,900.00	259,200.00
	<b>Function: 282</b>	Communication Services		
	<b>Function: 282</b>	Communication Services	<b>Total:</b>	
			287,300.00	286,000.00
	<b>Function: 283</b>	Staff/Personnel Svcs		

**Oakland Schools**  
**Annual Budgeting Amendment Report**  
As of 3/10/2026

Function		Location Description		FY2026	FY2027
			Total:	Amendment	
Function: 283	Staff/Personnel Svcs		Total:	1,226,900.00	1,118,600.00
Function: 284	Support Svcs Tech				
Function: 284	Support Svcs Tech		Total:	4,137,900.00	4,078,800.00
Function: 285	Pupil Accounting				
Function: 285	Pupil Accounting		Total:	186,500.00	201,200.00
Function: 289	Other Central Services				
Function: 289	Other Central Services		Total:	57,500.00	57,500.00
Function: 299	Other Support Services				
Function: 299	Other Support Services		Total:	214,400.00	209,500.00
Function: 411	Pymt to K12 Public W/In St				
Function: 411	Pymt to K12 Public W/In St		Total:	3,088,000.00	3,088,000.00
Function: 511	Debt Svc LT-Principal				
Function: 511	Debt Svc LT-Principal		Total:	244,900.00	224,600.00
Function: 627	Fund Mod-Co-op Activity				
Function: 627	Fund Mod-Co-op Activity		Total:	19,100.00	19,100.00
Function: 632	Fund Mod-2016 Debt				
Function: 632	Fund Mod-2016 Debt		Total:	3,300,000.00	3,300,000.00
Function: 634	Fund Mod-QSCB Defeasement				
Function: 634	Fund Mod-QSCB Defeasement		Total:	0.00	0.00
Function: 645	Fund Mod-CP CFE Reno				
Function: 645	Fund Mod-CP CFE Reno		Total:	10,100,000.00	8,800,000.00
Function: 647	Fund Mod-CP Adm Bldg Reno				
Function: 647	Fund Mod-CP Adm Bldg Reno		Total:	104,000.00	104,000.00
Fund: 600	Vocational Ed Fund		Total:	58,327,900.00	57,539,400.00
Type: 5	Expense		Total:	58,327,900.00	57,539,400.00

End of Report

# Oakland Schools

## Annual Budgeting Amendment Report

As of 3/10/2026

Location	Location Description	FY2026 Amendment	FY2027
<b>Type: 4 Revenue</b>			
<b>Fund: 600</b>	Vocational Ed Fund		
Location: 000	None	Total: 57,248,600.00	57,391,800.00
Location: 013	Event Management Operations	Total: 10,000.00	10,000.00
Location: 050	Career Focused Educ Admin	Total: 6,500.00	6,500.00
Location: 051	OTC Early College	Total: 445,000.00	445,000.00
Location: 056	OSTC-NW	Total: 11,000.00	11,000.00
Location: 057	OSTC-SE	Total: 3,000.00	3,000.00
Location: 058	OSTC-NE	Total: 13,000.00	13,000.00
Location: 059	OSTC-SW	Total: 41,800.00	41,800.00
Location: 062	STEMi	Total: 0.00	0.00
Fund: 600	Vocational Ed Fund	Total: 57,778,900.00	57,922,100.00
Type: 4	Revenue	Total: 57,778,900.00	57,922,100.00

**Type: 5 Expense**

<b>Fund: 600</b>	Vocational Ed Fund		
Location: 001	Office Of The Superintendent	Total: 223,100.00	228,300.00
Location: 002	Deputy Supt-Education Services	Total: 156,900.00	158,200.00
Location: 003	Asst Supt-Finance & Operations	Total: 97,400.00	94,700.00
Location: 006	LEA & Administration Support	Total: 32,800.00	32,800.00
Location: 011	Financial Services	Total: 1,097,900.00	1,110,000.00
Location: 013	Event Management Operations	Total: 197,600.00	192,700.00
Location: 014	Government & Community Svcs	Total: 183,800.00	184,900.00
Location: 018	Event Management-Workshops	Total: 16,800.00	16,800.00
Location: 028	Tech Services-Licensing	Total: 458,300.00	469,900.00
Location: 029	Tech Services Administration	Total: 83,600.00	83,200.00
Location: 030	Technical Support Services	Total: 334,100.00	299,900.00
Location: 032	Application Services	Total: 1,123,600.00	1,116,300.00
Location: 033	Enterprise Tech Services	Total: 1,344,400.00	1,333,000.00
Location: 038	Legal Affairs	Total: 514,600.00	520,300.00
Location: 039	Records Management	Total: 7,200.00	7,300.00
Location: 040	Auxiliary Services Admin	Total: 97,600.00	91,800.00
Location: 041	Facilities Management	Total: 142,400.00	142,300.00
Location: 042	Ofc of Procurement & Contracts	Total: 413,800.00	419,000.00
Location: 044	Corporate & District Services	Total: 317,000.00	331,200.00
Location: 045	Pupil Transportation	Total: 6,100.00	6,300.00
Location: 047	Shipping & Receiving	Total: 66,700.00	94,300.00
Location: 049	Communications Services	Total: 292,800.00	291,600.00
Location: 051	OTC Early College	Total: 562,400.00	562,400.00
Location: 055	District & Campus Support	Total: 3,452,100.00	3,875,600.00
Location: 056	OSTC-NW	Total: 5,714,600.00	5,761,400.00
Location: 057	OSTC-SE	Total: 5,951,800.00	5,928,200.00
Location: 058	OSTC-NE	Total: 6,607,500.00	6,722,700.00
Location: 059	OSTC-SW	Total: 6,160,200.00	6,187,200.00
Location: 061	LEA Transportation Support	Total: 1,800,000.00	1,800,000.00
Location: 062	STEMi	Total: 504,400.00	499,300.00
Location: 063	Career Readiness	Total: 3,775,700.00	3,790,700.00
Location: 064	Career Readiness Camps	Total: 100,000.00	100,000.00
Location: 065	CFE STEMCo Operations	Total: 134,500.00	131,300.00
Location: 066	Nano Tech CFE	Total: 463,800.00	442,000.00

**Oakland Schools**  
**Annual Budgeting Amendment Report**  
As of 3/10/2026

Location	Location Description	FY2026 Amendment	FY2027
Location: 081	School Culture and Climate	Total: 236,900.00	244,000.00
Location: 083	Human Resources	Total: 1,186,900.00	1,078,600.00
Location: 085	Instruction & Pedagogy	Total: 166,400.00	162,900.00
Location: 086	Research/Evaluation & Assess	Total: 252,900.00	256,400.00
Location: 087	Curriculum & Assessment	Total: 110,400.00	109,900.00
Location: 089	Leadership & School Improvemnt	Total: 24,100.00	23,900.00
Location: 091	Plant & Fixed-Plant Operations	Total: 278,800.00	301,800.00
Location: 092	Plant & Fixed-Telephone	Total: 62,900.00	63,200.00
Location: 094	Plant & Fixed-Capital Outlay	Total: 50,000.00	50,000.00
Location: 095	Transfers Out	Total: 13,523,100.00	12,223,100.00
Fund: 600	Vocational Ed Fund	Total: 58,327,900.00	57,539,400.00
Type: 5	Expense	Total: 58,327,900.00	57,539,400.00

End of Report

**OAKLAND SCHOOLS CAREER FOCUSED EDUCATION  
FUNDED PROJECTS/GRANTS  
REVENUE AND EXPENDITURE BUDGET  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>FUND 605</b>			
FUND EQUITY, BEGINNING OF YEAR			
Non-Spendable Prepaids, Inventory, & Deposits	4,388	42,400	42,400
Unassigned	(17,442)	(40,700)	(40,700)
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>(13,054)</b>	<b>1,700</b>	<b>1,700</b>
OPERATING REVENUE			
Local & Other Sources	43,762	110,000	54,700
State Sources	49,735	1,060,000	1,046,900
Federal Sources	1,877,832	1,850,000	1,845,800
<b>TOTAL REVENUE</b>	<b>1,971,329</b>	<b>3,020,000</b>	<b>2,947,400</b>
<b>TOTAL REVENUE AND BEGINNING BALANCE</b>	<b>1,958,275</b>	<b>3,021,700</b>	<b>2,949,100</b>
EXPENDITURES			
Added Needs - 120	120,590	197,000	140,700
Support Services Pupil - 210	1,280,670	1,229,000	1,286,900
Support Services Instructional Staff - 220	393,927	409,200	334,000
Operations & Maintenance - 260	14,200	-	-
Pupil Transportation Services - 270	12,639	17,500	17,500
Support Services Central - 280	134,461	167,300	168,300
Payments to Other Public Schools - 410	120	-	-
Payments to Not for Profit Entities - 440	-	1,000,000	1,000,000
<b>TOTAL EXPENDITURES</b>	<b>1,956,607</b>	<b>3,020,000</b>	<b>2,947,400</b>
FUND EQUITY, END OF YEAR			
Non-Spendable Prepaids, Inventory, & Deposits	42,399	42,400	42,400
Unassigned	(40,731)	(40,700)	(40,700)
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>1,668</b>	<b>1,700</b>	<b>1,700</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>1,958,275</b>	<b>3,021,700</b>	<b>2,949,100</b>

**OAKLAND SCHOOLS  
CAREER FOCUSED EDUCATION FUND  
5-YEAR FORECAST**

	Actuals 2024-25	AM2 2025-26	Proposed 2026-27	Projection 2027-28	Projection 2028-29	Projection 2029-30	Projection 2030-31	Proposed 2031-32
<b>REVENUES:</b>								
Local Revenues:								
Property tax revenues	46,189,355	48,379,700	50,024,600	51,375,300	52,711,100	54,081,600	55,487,700	56,930,400
Investment revenue	1,285,854	1,220,000	976,000	780,000	700,000	680,000	680,000	680,000
Miscellaneous and other revenues	486,162	580,300	540,300	540,300	540,300	540,300	540,300	540,300
State Revenues	6,684,334	6,001,200	5,783,500	5,912,200	5,993,600	6,077,600	6,164,100	6,253,300
State payment in lieu of taxes	508,157	559,700	559,700	559,700	559,700	559,700	559,700	559,700
Transfers In - GEF	-	1,000,000	-	-	-	-	-	-
Other Financing Sources	79,255	38,000	38,000	38,000	38,000	38,000	38,000	38,000
<b>TOTAL REVENUES:</b>	<b>55,233,117</b>	<b>57,778,900</b>	<b>57,922,100</b>	<b>59,205,500</b>	<b>60,542,700</b>	<b>61,977,200</b>	<b>63,469,800</b>	<b>65,001,700</b>

<b>EXPENDITURES:</b>								
<b>Oakland Schools - Direct Programming:</b>								
Salaries/wages - Non union	7,362,724	8,342,600	8,551,100	8,833,300	9,124,800	9,425,900	9,737,000	10,058,300
Salaries/wages - Union	9,706,797	10,345,900	10,468,000	10,770,500	11,081,800	11,402,100	11,731,600	12,070,600
Total Salaries/wages	17,069,521	18,688,500	19,019,100	19,603,800	20,206,600	20,828,000	21,468,600	22,128,900
Employee Benefits:								
FICA insurance	1,230,211	1,382,500	1,423,800	1,499,700	1,545,800	1,593,300	1,642,300	1,692,900
MPERS retirement program costs	5,175,791	5,242,100	4,955,400	5,252,900	5,468,600	5,693,100	5,926,900	6,170,300
MPERS Sec 147c & 147g	2,449,162	2,544,300	2,519,800	2,648,500	2,729,900	2,813,900	2,900,400	2,989,600
Healthcare insurance	2,454,110	2,361,400	2,657,100	2,763,400	2,873,900	2,988,900	3,108,500	3,232,800
Other employee insurances	728,573	803,400	924,900	971,100	1,019,700	1,070,700	1,124,200	1,180,400
Purchased Services	3,614,758	4,376,900	4,375,700	4,463,200	4,552,500	4,643,600	4,736,500	4,831,200
Supplies and Materials	1,148,553	1,641,200	1,662,400	1,712,300	1,763,700	1,816,600	1,871,100	1,927,200
Utilities Costs	898,337	899,900	902,200	938,300	975,800	1,014,800	1,055,400	1,097,600
Capital Outlay-instructional equipment	46,523	58,600	58,600	55,000	55,000	55,000	55,000	55,000
Capital Outlay-IT Refresh	199,659	52,000	52,000	75,000	240,000	75,000	75,000	75,000
Capital Outlay-facility, non-instruct capital	-	3,000	-	20,000	20,000	20,000	20,000	20,000
Dues/Fees/Leases	161,175	174,300	178,900	182,500	186,200	189,900	193,700	197,600
Property tax abatement & delinquency WO	68,973	120,100	125,100	128,400	131,800	135,200	138,700	142,300
Transfers Out - CPF 404	9,000,000	10,100,000	8,800,000	7,900,000	8,000,000	8,200,000	8,000,000	10,000,000
Transfers Out - CPF 406	104,000	104,000	104,000	104,000	104,000	104,000	104,000	104,000
Transfers Out - Debt Service*	4,215,100	3,300,000	3,300,000	3,300,000	3,300,000	3,300,000	3,300,000	1,956,500
Transfers Out - SRF	19,100	19,100	19,100	19,100	19,100	19,100	19,100	19,100
Transfers to LEAs	155,742	197,200	205,200	205,200	205,200	205,200	205,200	205,200
Total Expenditure - Direct Programming	48,739,288	52,068,500	51,283,300	51,842,400	53,397,800	54,766,300	55,944,600	58,025,600

**OAKLAND SCHOOLS  
CAREER FOCUSED EDUCATION FUND  
5-YEAR FORECAST**

	Actuals 2024-25	AM2 2025-26	Proposed 2026-27	Projection 2027-28	Projection 2028-29	Projection 2029-30	Projection 2030-31	Proposed 2031-32
<b>Oakland Schools - Regional Programs:</b>								
Tuition - Early College/Dual Enrollment	479,449	482,500	482,500	497,000	511,900	527,300	543,100	559,400
Regional certifications/competitions	206,407	150,000	155,000	159,700	164,500	169,400	174,500	179,700
K-12 Career Readiness - LEA support	3,207,102	3,322,500	3,319,300	3,319,300	3,319,300	3,319,300	3,319,300	3,319,300
PS - STEM mobile classroom	451,124	504,400	499,300	550,000	550,000	550,000	550,000	550,000
Regional Programs - LEA support	4,344,082	4,459,400	4,456,100	4,526,000	4,545,700	4,566,000	4,586,900	4,608,400
Transportation Reimbursement - LEA support	1,799,999	1,800,000	1,800,000	1,800,000	1,800,000	1,800,000	1,800,000	1,800,000
Total Expenditures - Regional Programs	6,144,081	6,259,400	6,256,100	6,326,000	6,345,700	6,366,000	6,386,900	6,408,400

**GRAND TOTAL EXPENDITURES** 54,883,369 58,327,900 57,539,400 58,168,400 59,743,500 61,132,300 62,331,500 64,434,000

**GRAND TOTAL EXCESS/(DEFICIT)** 349,748 (549,000) 382,700 1,037,100 799,200 844,900 1,138,300 567,700

**FUND BALANCES:**

Beginning of Year - Non-spendable 29,088 43,000 43,000 43,000 43,000 43,000 43,000 43,000 43,000

Beginning of Year - Restricted 8,159,759 8,495,600 7,946,600 8,329,300 9,366,400 10,165,600 11,010,500 12,148,800

Beginning of Year - Total 8,188,847 8,538,600 7,989,600 8,372,300 9,409,400 10,208,600 11,053,500 12,191,800

End of Year - Non-spendable 43,004 43,000 43,000 43,000 43,000 43,000 43,000 43,000 43,000

End of Year - Restricted 8,495,591 7,946,600 8,329,300 9,366,400 10,165,600 11,010,500 12,148,800 12,716,500

End of Year - Total 8,538,595 7,989,600 8,372,300 9,409,400 10,208,600 11,053,500 12,191,800 12,759,500

End of Year Restricted FB as % of Exp. 15.5% 13.6% 14.5% 16.1% 17.0% 18.0% 19.5% 19.7%



# **Special Revenue, Debt Service, Capital Projects and Internal Service Funds Original Budget**

Fiscal Year 2026-27

**SPECIAL REVENUE FUNDS  
FUND SPECIFIC ANALYSIS**

**Shared Services & Tuition Programs Fund 270**

The Shared Services & Tuition Programs Fund is a cost-recovery fund that accounts for all tuition programs of the District as well as shared services engagements and other special programs. The following operations are accounted for in this fund:

- Virtual Learning Academy Consortium (VLAC) K-8 and 9-12
- Accelerated College Experience
- Graduation Alliance
- Shared Services
- Foreign Exchange Program

This fund is projected to have a FY 2026-27 year-end committed fund balance of \$3,703,500. Anticipated ending fund balances for FY 2025-26 and 2026-27 are detailed in the schedule below:

	FY 2025-26 Amend 2 Budget	FY 2026-27 Budget
Non-Spendable - Prepays	\$ 2,600	\$ 2,600
Committed fund balance	3,984,200	3,703,500
<b>Total Budgeted Ending Fund Balance</b>	<b>\$ 3,986,800</b>	<b>\$ 3,706,100</b>

FY 2026-27 revenue is projected to be \$21.0 million:

- Tuition revenue - \$5.1 million
- Graduation Alliance - \$1.4 million
- Foreign Exchange - \$.2 million
- Shared Services - \$11.9 million
- State Aid Revenue (Sec 147) - \$1.6 million
- Indirect and other revenue - \$.8 million

FY 2026-27 operational expenses are projected to be \$21.3 million:

- Tuition program expenditures - \$4.8 million
- Graduation Alliance - \$1.4 million
- Foreign Exchange - \$.2 million
- Shared Services, including administration - \$14.9 million

Staffing levels in this fund are unchanged. Staffing is completely dependent on existing intergovernmental agreements for shared services and based on enrollment in tuition programs. It will be reevaluated as necessary throughout 2026-27.

**Oakland Network for Education Fund 271**

The Oakland Network for Education (ONE) is a fiber-based data network connecting twenty-nine consortium members in Oakland County. Also contained in this fund is funding for certain countywide collaborative programs. Between 2023-24 and 2025-26, a \$1.9 million ONE infrastructure update was done resulting in higher expenditures in those years. The project is expected to be complete by June 30, 2026. This fund is projected to have a FY 2026-27 year-end

committed fund balance of \$12,349,800. Anticipated ending fund balances for FY 2025-26 and 2026-27 are detailed in the schedule below:

	FY 2025-26 Amend 2 Budget	FY 2026-27 Budget
Committed fund balance	\$ 12,706,500	\$ 12,349,800

FY 2026-27 revenue is projected to be \$1.5 million:

- Operating Transfer In, including Oakland Schools Fees - \$.5 million
- ONE Fees - \$.5 million
- E-Rate Revenue & Interest - \$.5 million

FY 2026-27 expenditures are projected to be \$1.8 million:

- Literacy Essentials Oakland - \$.3 million
- EPIC Math Numeracy Initiative - \$.3 million
- ONE Professional Services, Maintenance, Capital & Other - \$1.2 million

**Medicaid Fund 273**

The Medicaid Fund contains the transactions of the Medicaid School Services Program, which is a fee-based program. All Medicaid revenues, less operational expenses of the program are distributed to participating constituent districts and as such the fund is expected to have no committed fund balance at year end.

FY 2026-27 revenue is projected to be \$18.9 million:

- Medicaid Fees (Local and Federal) - \$18.5 million
- Interest income & other local revenue - \$.3 million
- State Revenue (MPERS Sec 147) & Other - \$.1 million

FY 2026-27 expenditures are projected to be \$18.9 million:

- Wages & Benefits - \$.6 million
- Facility & Program Operations - \$.1 million
- Transfers to LEAs - \$18.2 million

**HR/Finance Consortium Fund 277**

The HR/Finance Consortium is a result of a collaborative effort between twenty (20) Oakland County school districts to select a county-wide Enterprise Resource Planning system for HR and financial applications. In FY 2012-13 through FY 2015-16 Oakland Schools transferred a net \$4,875,000 from the Collaborative Program Development Initiative (CPDI) Fund, which is a component of the ONE Fund 271, to subsidize the per student cost for all participating districts. Anticipated ending fund balances for FY 2025-26 and 2026-27 are detailed in the schedule below:

	FY 2025-26 Amend 2 Budget	FY 2026-27 Budget
Committed fund balance	\$ 892,700	\$ 961,300

FY 2026-27 revenue is projected to be \$1.4 million:

- District Consortium Fees - \$1.2 million
- State Revenue (MPSERS Sec 147) & Other - \$.2 million

FY 2026-27 operational expenses are projected to be \$1.3 million:

- Salaries and benefits - \$.9 million
- Purchased services, supplies and capital outlay - \$.4 million

**School Activities Fund 290**

Due to the issuance of Governmental Accounting Standards Board (GASB) 84, Fiduciary Activities, Oakland Schools utilizes a School Activities Fund to report activities previously considered fiduciary activities but no longer meeting that definition per GASB 84. Projected revenues and expenditures both total \$180,000. This fund has a projected ending fund balance of \$268,600 in both FY 2025-26 and 2026-27.

**DEBT SERVICE FUNDS – FUND SPECIFIC ANALYSIS**

Oakland Schools maintains three debt service funds as follows:

The Debt Service Fund 311 – 2016 Refunding Bonds accounts for the partial refunding of the 2007 CFE Campus Renovation Bonds. The remainder of the unrefunded bonds were paid off in May 2017. The bonds have a debt payment schedule through 2036 with annual debt service expenditures of approximately \$3.3 million. At the time of printing of this document, the District is doing a second refunding of these bonds in order to reduce interest costs. The impact of that refunding will be included in the first budget amendment of 2026-27.

The Debt Service Fund 313 – Qualified School Construction Bond (QSCB) accounts for the 2010 bond which was used to fund Oakland Schools’ renovations of the Administration Building and Career Focused Education Campuses. Resources are accumulated in this fund and transferred to the Debt Service Fund 314 annually in order to make semi-annual interest payments and annual set-aside payment. The debt payment schedule runs through 2027.

The Debt Service Fund 314 – Qualified School Construction Bond Construction Reserve Fund accounts for the required annual set-aside payments for the QSCB Bond. Upon the bonds’ maturity in 2027, the assets set aside and invested will pay the bond principal.

Anticipated ending fund balances for FY 2025-26 and 2026-27 for the three debt service funds are detailed in the schedule below:

	FY 2025-26 Amend 2 Budget	FY 2026-27 Budget
DSF 311 - 2016 Refunding Bonds Restricted Fund Balance	\$ 10,039,300	\$ 11,164,100
DSF 313 - QSCB Restricted Fund Balance	\$ 460,900	\$ -
DSF 314 - QSCB Construction Reserve Fund Restricted Fund Balance	\$ 13,588,400	\$ -

FY 2026-27 revenue consists primarily of operating transfers to fund debt service, interest earnings and a Federal interest subsidy in the QSCB Construction Reserve Fund.

FY 2026-27 expenditures consist of principal and interest payments, along with minor investment advisory service fees.

**CAPITAL PROJECT FUNDS – FUND SPECIFIC ANALYSIS**

**CFE Technical Campus Renovations Phase II Project – Fund 404**

Oakland Schools Career Focused Education Technical Campus renovations continue based on need at each of the four technical campuses. Significant renovations have been occurring over the last two years and were completed in 2025-26 (see Enterprise-wide Executive Summary for additional information). Anticipated ending fund balances for FY 2025-26 and 2026-27 are detailed in the schedule below:

	FY 2025-26 Amend 2 Budget	FY 2026-27 Budget
Non-Spendable - Prepays	\$ 18,700	\$ 18,700
Committed fund balance	17,089,000	9,972,900
<b>Total Budgeted Ending Fund Balance</b>	<b>\$ 17,107,700</b>	<b>\$ 9,991,600</b>

FY 2026-27 revenue is projected to be \$10.2 million which consists of interest earned and an operating transfer in from the Career Focused Education Fund of \$8.8 million.

FY 2026-27 expenditures are projected to be \$21.8 million, consisting of various facility renovations detailed in the 5-year capital plan of the organization. Significant projects in 2026-27 include safety & security updates at all campuses, and HVAC replacement and NAIS lab buildout at the Southeast campus. These projects may span multiple fiscal years from 2025-26 to 2026-27.

**Administration Building Renovation & Maintenance – Fund 406**

The Administration Building Renovation & Maintenance Capital Projects Fund 406 contains funding for various capital projects as necessary at the Administration Building & Conference Center in the following categories: HVAC and chiller replacement, audio/visual (AV) updates, safety and security upgrades and general capital projects. FY 2025-26 and 2026-27 fund balances are detailed in the schedule below:

	FY 2025-26 Amend 2 Budget	FY 2026-27 Budget
Committed fund balance	\$ 32,700	\$ 32,700
Non-Spendable Prepays & Inventory	11,075,200	6,646,100
<b>Total Budgeted Ending Fund Balance</b>	<b>\$ 11,107,900</b>	<b>\$ 6,678,800</b>

FY 2026-27 revenue is projected to be \$.8 million and consists of interest earned and operating transfers from the GEF, SEF and CFEF for future projects.

FY 2026-27 expenditures are projected to be \$5.3 million consisting of various facility renovations detailed in the 5-year capital plan of the organization, including those described above. These projects may span multiple fiscal years from 2025-26 to 2026-27.

**ENTERPRISE FUND – FUND SPECIFIC ANALYSIS**

**Production Print Enterprise Fund – FUND 710**

The Production Print Enterprise Fund accounts for all operations of the District’s full-service print shop operations. In FY 2020-21, the district retroactively applied GASB 68, *Accounting and Financial Reporting for Pensions* and GASB 75, *Accounting and Financial Reporting for Postemployment Benefits Other than Pensions* to the Print Production Enterprise Fund. The application of these standards resulted in a negative fund balance due to the recording of the fund’s share of statewide pension and OPEB liabilities. Anticipated ending net assets for this fund for FY 2025-26 and 2026-27 are detailed in the schedule below:

	FY 2025-26 Amend 2 Budget	FY 2026-27 Budget
Net investment in capital assets	\$ 93,800	\$ 93,800
Restricted Net OPEB Asset	\$ 95,300	\$ 95,300
Unrestricted net position	(972,400)	(1,153,600)
Total net position	\$ (783,300)	\$ (964,500)

FY 2026-27 revenue is projected to be \$.9 million:

- Operating Revenue - \$.8 million
- State Revenue (MPERS Sec 147) & other - \$.1 million

In 2024-25, administration decided to scale down the size of print shop operations and discontinue business with local county, city and township governments and focus services on our constituent school districts.

FY 2026-27 expenditures are projected to be \$1.1 million:

- Wages & Benefits - \$.5 million
- Purchased Services - \$.2 million
- Supplies, Materials & Other - \$.3 million
- Facility Operations - \$.1 million

**INTERNAL SERVICE FUNDS – FUND SPECIFIC ANALYSIS**

**Risk Related Activity Fund (RRAF) – FUND 810**

The RRAF is an internal service fund in which all insurances of the district are reported. This fund is projected to have a FY 2026-27 year-end net position of \$3.2 million. Anticipated net position for FY 2025-26 and 2026-27 is detailed in the schedule below:

	FY 2025-26 Amend 2 Budget	FY 2026-27 Budget
Claim Fluctuation Reserve - Professional Liability	1,280,000	1,320,000
Claim Fluctuation Reserve - Cyber Liability	1,278,400	1,278,400
Contingency Reserve - P/C Settlements	50,000	50,000
Retained Earnings	473,200	537,800
Total Net Position	\$ 3,081,600	\$ 3,186,200

The district has fully funded (100%) its compensated absence liabilities through June 30, 2025, and will continue to fund the liabilities annually. The accruals currently reflected on the fund's balance sheet for compensated absences total \$3.7 million.

**OAKLAND SCHOOLS COOPERATIVE SERVICES FUND BUDGET  
 SHARED SERVICES & TUITION PROGRAMS FUND 270  
 FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
FUND EQUITY, BEGINNING OF YEAR			
Non-Spendable for Prepaids, Inventory, & Deposits	9,460	2,600	2,600
Committed	4,313,498	5,367,800	3,984,200
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>4,322,958</b>	<b>5,370,400</b>	<b>3,986,800</b>
REVENUE			
LOCAL SOURCES			
Earnings on Investment	204,819	185,000	148,000
Virtual Learning Academy K-8 Tuition	1,626,200	1,117,400	1,644,000
Virtual Learning Academy 9-12 Tuition	1,541,975	2,409,200	2,020,500
VLAC Learning Academy K-8 Tuition Refund	-	(450,000)	-
Accelerated College Experience Tuition	1,092,700	1,433,300	1,470,000
Accelerated College Experience Tuition Refund	-	(215,000)	-
Graduation Alliance	1,638,941	1,400,000	1,400,000
Foreign Exchange Program	144,000	108,000	180,000
Shared Services	10,989,830	11,323,900	11,912,300
E-Rate Revenue	56,497	80,000	80,000
Miscellaneous Revenue	1,169	2,000	2,000
<b>TOTAL LOCAL SOURCES</b>	<b>17,296,131</b>	<b>17,393,800</b>	<b>18,856,800</b>
STATE SOURCES			
Section 147a(2) MPSERS Normal Cost Offset	304,337	379,500	319,500
Section 147a(3) MPSERS Cost Offset ISDs & Districts	85,128	-	-
Section 147a(4) MPSERS Cost Offset - Reduced UAAL	450,789	-	-
Section 147c(1) MPSERS UAAL Rate Stabilization	829,097	1,220,900	1,208,600
Section 147c(2) MPSERS One Time Deposit	188,458	-	-
Section 27L4 Healthcare Offset	-	113,200	-
Section 147e MPSERS Employer DC Match	41,015	50,100	50,100
Section 147g MPSERS 3% Healthcare Reimbursement	79,347	-	-
<b>TOTAL STATE SOURCES</b>	<b>1,978,171</b>	<b>1,763,700</b>	<b>1,578,200</b>
OTHER FINANCING SOURCES			
Indirect Revenue	522,310	538,400	552,000
<b>TOTAL OTHER FINANCING SOURCES</b>	<b>522,310</b>	<b>538,400</b>	<b>552,000</b>
<b>TOTAL REVENUE</b>	<b>19,796,612</b>	<b>19,695,900</b>	<b>20,987,000</b>
<b>TOTAL REVENUE AND BEGINNING BALANCE</b>	<b>24,119,570</b>	<b>25,066,300</b>	<b>24,973,800</b>
EXPENDITURES			
Virtual Learning Academy K-8	1,546,256	2,106,200	1,925,900
Virtual Learning Academy 9-12	1,233,881	1,616,400	1,528,100
Oakland Accelerated College Experience	997,701	1,445,200	1,370,500
Graduation Alliance	1,552,953	1,334,700	1,335,100
Foreign Exchange Program	114,621	91,000	219,000
Shared Services	12,990,237	14,143,600	14,537,900
Shared Services Administration	313,520	342,400	351,200
<b>TOTAL EXPENDITURES</b>	<b>18,749,169</b>	<b>21,079,500</b>	<b>21,267,700</b>
FUND EQUITY, END OF YEAR			
Non-Spendable for Prepaids, Inventory, & Deposits	2,606	2,600	2,600
Committed	5,367,795	3,984,200	3,703,500
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>5,370,401</b>	<b>3,986,800</b>	<b>3,706,100</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>24,119,570</b>	<b>25,066,300</b>	<b>24,973,800</b>

**OAKLAND SCHOOLS COOPERATIVE SERVICE FUND BUDGET  
OAKLAND NETWORK FOR EDUCATION FUND 271  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
FUND EQUITY, BEGINNING OF YEAR			
Committed	14,086,734	13,889,800	12,706,500
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>14,086,734</b>	<b>13,889,800</b>	<b>12,706,500</b>
REVENUE			
Operating Transfer In - GEF	413,400	413,400	413,400
Operating Transfer In - SEF	6,600	6,600	6,600
Operating Transfer In - CFEF	6,600	6,600	6,600
ONE Capital Outlay Fees	526,149	523,800	523,800
E-Rate Revenue	94,787	400,000	100,000
Earnings on Investment	628,180	530,000	424,000
<b>TOTAL REVENUE</b>	<b>1,675,716</b>	<b>1,880,400</b>	<b>1,474,400</b>
<b>TOTAL REVENUE AND BEGINNING BALANCE</b>	<b>15,762,450</b>	<b>15,770,200</b>	<b>14,180,900</b>
EXPENDITURES			
Expenditures	1,872,685	3,063,700	1,831,100
<b>TOTAL EXPENDITURES</b>	<b>1,872,685</b>	<b>3,063,700</b>	<b>1,831,100</b>
FUND EQUITY, END OF YEAR			
Committed	13,889,765	12,706,500	12,349,800
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>13,889,765</b>	<b>12,706,500</b>	<b>12,349,800</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>15,762,450</b>	<b>15,770,200</b>	<b>14,180,900</b>

**OAKLAND SCHOOLS COOPERATIVE SERVICE FUND BUDGET  
OAKLAND NETWORK FOR EDUCATION FUND 271  
FISCAL YEAR 2026-27**

<b>PROGRAM DESCRIPTION</b>			<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
221	XXXX	Literacy Essentials Oakland - CPDI	216,949	315,000	301,700
221	XXXX	Numeracy Initiative - CPDI	174,240	325,000	300,000
231	3170	Legal Fees	5,395	5,000	5,000
284	3190	Other Professional & Technical Services	476,908	715,500	715,500
284	3450	Copyright Fees/Software Licenses	60,720	80,800	80,800
284	4120	Equipment Repair & Maintenance	234,390	270,000	270,000
284	5990	Misc Supplies & Materials	3,469	10,000	10,000
284	6410	New Equip/Furniture - Depreciable	27,631	10,000	10,000
456	6220	ONE Infastructure	379,065	1,219,300	25,000
511	XXXX	Principal & Interest - SBITA	133,118	113,100	113,100
634	8110	ONE Fund Transfer to Fund 313	160,800	-	-
<b>TOTAL EXPENDITURES</b>			<b>1,872,685</b>	<b>3,063,700</b>	<b>1,831,100</b>

**OAKLAND SCHOOLS COOPERATIVE SERVICE FUND BUDGET  
 MEDICAID FUND 273  
 FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>FUND EQUITY, BEGINNING OF YEAR</b>			
Non-Spendable for Prepaids, Inventory, & Deposits	1,219	600	600
Committed	-	600	600
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>1,219</b>	<b>1,200</b>	<b>1,200</b>
<b>REVENUE</b>			
<b>LOCAL SOURCES</b>			
Medicaid Cost Recovery Fees	190,421	217,100	338,900
Medicaid Service Fees	14,150,138	14,897,300	15,000,000
Medicaid Service Fees - Caring 4 Students	1,056,959	923,500	1,356,200
Earnings on Investment	458,153	450,000	360,000
<b>TOTAL LOCAL SOURCES</b>	<b>15,855,671</b>	<b>16,487,900</b>	<b>17,055,100</b>
<b>STATE SOURCES</b>			
Section 147a(2) MPSERS Normal Cost Offset	12,927	15,600	13,600
Section 147a(3) MPSERS Cost Offset ISDs & Districts	3,616	-	-
Section 147a(4) MPSERS Cost Offset - Reduced UAAL	19,148	-	-
Section 147c(1) MPSERS UAAL Rate Stabilization	35,217	50,100	45,500
Section 147c(2) MPSERS One Time Deposit	8,005	-	-
Section 27L4 Healthcare Offset	-	4,600	-
Section 147e MPSERS Employer DC Match	1,742	2,100	2,100
Section 147g MPSERS 3% Healthcare Reimbursement	6,918	-	-
<b>TOTAL STATE SOURCES</b>	<b>87,573</b>	<b>72,400</b>	<b>61,200</b>
<b>FEDERAL SOURCES</b>			
Medicaid Outreach Fees	1,538,160	1,800,000	1,800,000
<b>TOTAL REVENUE</b>	<b>17,481,404</b>	<b>18,360,300</b>	<b>18,916,300</b>
<b>TOTAL REVENUE AND BEGINNING BALANCE</b>	<b>17,482,623</b>	<b>18,361,500</b>	<b>18,917,500</b>
<b>EXPENDITURES</b>			
Expenditures	17,481,407	18,360,300	18,916,300
<b>TOTAL EXPENDITURES</b>	<b>17,481,407</b>	<b>18,360,300</b>	<b>18,916,300</b>
<b>FUND EQUITY, END OF YEAR</b>			
Non-Spendable for Prepaids, Inventory, & Deposits	583	600	600
Committed	633	600	600
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>1,216</b>	<b>1,200</b>	<b>1,200</b>
<b>TOTAL EXPENDITURES AND ENDING BALANCE</b>	<b>17,482,623</b>	<b>18,361,500</b>	<b>18,917,500</b>

**OAKLAND SCHOOLS COOPERATIVE SERVICE FUND BUDGET  
 MEDICAID FUND 273  
 FISCAL YEAR 2026-27**

<b>PROGRAM DESCRIPTION</b>			<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b><i>SALARIES</i></b>					
289	1390	Other Professional Business Salary	279,582	292,200	283,800
289	1620	Secretarial/Clerical/Bookkeepr	54,017	50,100	53,500
289	1760	Compensated Absences	5,653	3,000	3,000
<b>SALARIES TOTAL</b>			<b>339,252</b>	<b>345,300</b>	<b>340,300</b>
<b><i>EMPLOYEE BENEFITS</i></b>					
289	2110	Group Life Insurance	245	300	300
289	2121	Long Term Disability	740	700	600
289	2122	Short Term Disability	921	1,000	1,200
289	2130	Group Health	61,379	64,200	65,000
289	2140	Dental Health Care	4,293	5,600	5,900
289	2150	Vision Care	403	400	400
289	2490	Other Prof Srvs for Employees	1,100	1,200	1,200
289	2820	Contr To Retirement Funds	97,319	90,000	83,200
289	2821	Defined Contr Employer	5,584	7,800	6,300
289	2822	Personal Health Care Fund	1,595	2,200	1,800
289	2823	Contr To Retirement Funds - UAAL	35,217	51,400	45,500
289	2824	Contr To Retirement 147c2 UAAL	8,005	-	-
289	2825	MPSERS 147g 3% Health Reimb	6,918	-	-
289	2830	Employer Social Security	25,386	27,200	25,900
289	2840	Workers Compensation	657	200	400
<b>EMPLOYEE BENEFITS TOTAL</b>			<b>249,762</b>	<b>252,200</b>	<b>237,700</b>
<b><i>FACILITY OPERATIONS</i></b>					
261	3190	Other Professional & Technology Services	242	400	600
261	3830	Water & Sewage	120	100	200
261	3840	Waste & Trash Disposal	426	100	100
261	3910	Property & Liability	1,194	1,300	800
261	4110	Land/Bldg Repair & Maintenance	2,267	1,300	3,000
261	4111	Plant & Fixed Operations	-	200	200
261	5510	Natural Gas	586	600	1,000
261	5520	Electricity	3,031	3,300	4,800
261	5990	Misc Supplies & Materials	4	-	200
261	6410	New Equipment/Furniture	929	800	1,100
511	7150	Lease Payment Principal & Interest	9,571	10,300	10,300
<b>FACILITY OPERATIONS TOTAL</b>			<b>18,370</b>	<b>18,400</b>	<b>22,300</b>

**OAKLAND SCHOOLS COOPERATIVE SERVICE FUND BUDGET  
 MEDICAID FUND 273  
 FISCAL YEAR 2026-27**

<b>PROGRAM DESCRIPTION</b>	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>OPERATIONS</b>			
231 3170 Legal Services	2,106	-	-
284 4120 Equipment Repair & Maintenance	-	-	1,000
284 6410 New Equipment/Furniture	636	3,300	34,500
284 6421 New Equipment - Computers	10,843	-	-
289 3190 Other Professional & Technical Services	89,185	92,000	96,000
289 3210 Mileage Reimbursement	-	300	300
289 3220 Employee Reimburse (Conference)	3,914	3,600	3,600
289 3410 Telephone	-	500	-
289 3450 Copyright Fees	249	300	300
289 3490 Other Misc Communications	749	600	600
289 4121 Equipment Repair & Maintenance - Printing	677	1,500	1,500
289 5910 Office Supplies	-	500	500
289 5990 Misc Supplies & Materials	257	500	500
289 7410 Dues & Fees	150	200	200
289 9990 Indirect	20,000	20,300	20,800
411 8910 Transfers to LEAs - Medicaid Fees	14,150,138	14,897,300	15,000,000
411 8913 Transfers to LEAs - Outreach Fees	1,538,160	1,800,000	1,800,000
411 8914 Transfers to LEAs - Caring 4 Students	1,056,959	923,500	1,356,200
<b>OPERATIONS TOTAL</b>	<b>16,874,023</b>	<b>17,744,400</b>	<b>18,316,000</b>
<b>TOTAL EXPENDITURES</b>	<b>17,481,407</b>	<b>18,360,300</b>	<b>18,916,300</b>

**OAKLAND SCHOOLS COOPERATIVE SERVICE FUND BUDGET  
HR/FINANCE CONSORTIUM FUND 277  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
FUND EQUITY, BEGINNING OF YEAR			
Committed	645,247	838,200	892,700
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>645,247</b>	<b>838,200</b>	<b>892,700</b>
REVENUE			
LOCAL SOURCES			
District Consortium Fees	1,185,294	1,161,000	1,183,700
Earnings on Investment	54,368	50,000	40,000
<b>TOTAL LOCAL SOURCES</b>	<b>1,239,662</b>	<b>1,211,000</b>	<b>1,223,700</b>
STATE SOURCES			
Section 147a(2) MPSERS Normal Cost Offset	17,913	20,900	15,500
Section 147a(3) MPSERS Cost Offset ISDs & Districts	5,011	-	-
Section 147a(4) MPSERS Cost Offset - Reduced UAAL	26,533	-	-
Section 147c(1) MPSERS UAAL Rate Stabilization	48,800	67,300	77,200
Section 147c(2) MPSERS One Time Deposit	11,092	-	-
Section 27L4 Healthcare Offset	-	6,200	-
Section 147e MPSERS Employer DC Match	2,414	2,800	2,800
Section 147g MPSERS 3% Healthcare Reimbursement	8,712	-	-
<b>TOTAL STATE SOURCES</b>	<b>120,475</b>	<b>97,200</b>	<b>95,500</b>
OTHER FINANCING SOURCES			
Operating Transfer In - GEF (OS Fees)	25,000	25,000	25,000
Operating Transfer In - SEF (OS Fees)	12,500	12,500	12,500
Operating Transfer In - CFEF (OS Fees)	12,500	12,500	12,500
<b>TOTAL OTHER FINANCING SOURCES</b>	<b>50,000</b>	<b>50,000</b>	<b>50,000</b>
<b>TOTAL REVENUE</b>	<b>1,410,137</b>	<b>1,358,200</b>	<b>1,369,200</b>
<b>TOTAL REVENUE AND BEGINNING BALANCE</b>	<b>2,055,384</b>	<b>2,196,400</b>	<b>2,261,900</b>
EXPENDITURES			
Expenditures	1,217,231	1,303,700	1,300,600
<b>TOTAL EXPENDITURES</b>	<b>1,217,231</b>	<b>1,303,700</b>	<b>1,300,600</b>
FUND EQUITY, END OF YEAR			
Committed	838,153	892,700	961,300
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>838,153</b>	<b>892,700</b>	<b>961,300</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>2,055,384</b>	<b>2,196,400</b>	<b>2,261,900</b>

**OAKLAND SCHOOLS COOPERATIVE SERVICE FUND BUDGET  
 HR/FINANCE CONSORTIUM FUND 277  
 FISCAL YEAR 2026-27**

<b>PROGRAM DESCRIPTION</b>	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b><i>SALARIES</i></b>			
1510 Information Management	530,386	549,600	571,600
1760 Compensated Absences	9,460	9,000	9,000
<b>SALARIES TOTAL</b>	<b>539,846</b>	<b>558,600</b>	<b>580,600</b>
<b><i>EMPLOYEE BENEFITS</i></b>			
2110 Life Insurance	398	500	500
2121 Long Term Disability	1,196	1,100	1,100
2122 Short Term Disability	1,536	1,400	2,100
2137 Group Health	49,346	34,300	34,800
2142 Dental Health Care	5,903	6,500	8,600
2152 Vision Care	535	400	400
2490 Professional Services For Employees	1,600	1,800	1,800
2820 Contributions To Retirement	140,856	153,200	140,500
2821 Defined Contribution Employer Match	16,836	17,500	9,500
2822 Personal Healthcare Fund	4,074	4,200	2,100
2823 Contributuions To Retirement Funds - UAAL	48,800	67,300	77,200
2824 Contr To Retirement 147c2 UAAL	11,092	-	-
2825 MPSERS 147g 3% Health Reimb	8,712	-	-
2830 Social Security	39,978	42,100	43,600
2840 Worker's Compensation	986	200	1,000
2920 Cash In Lieu Of Benefits	4,921	4,600	11,200
2930 Cellphone Stipend	540	500	-
2950 Vacation Sale	-	4,700	200
<b>EMPLOYEE BENEFITS TOTAL</b>	<b>337,309</b>	<b>340,300</b>	<b>334,600</b>
<b><i>PURCHASE SERVICES</i></b>			
3170 Legal Fees	-	6,200	-
3190 Other Professional & Technical Services	15,000	25,000	5,000
3191 Other Professional & Technical Services (PowerSchool)	-	20,000	20,000
3210 Mileage	186	200	200
3220 Conference Travel	6,127	8,000	8,200
3450 Copyright & Software Licenses	3,780	16,000	16,200
3610 Printing & Binding	3,449	3,500	4,500
3910 Property & General Liability	1,402	1,400	1,100
4140 Software Maintenance Agreements	142,037	142,800	147,400
<b>PURCHASED SERVICES TOTAL</b>	<b>171,981</b>	<b>223,100</b>	<b>202,600</b>
<b><i>SUPPLIES &amp; MATERIALS</i></b>			
5990 Misc Supplies & Materials	5,950	6,000	4,500
7410 Dues & Fees	940	1,000	1,200
8110 Operating Transfer - GEF Hosting Fee	127,000	127,000	130,000
8290 Payments to Districts	705	-	-
8915 Contingency	-	11,400	11,800
9990 Indirect	33,500	36,300	35,300
<b>SUPPLIES &amp; MATERIALS TOTAL</b>	<b>168,095</b>	<b>181,700</b>	<b>182,800</b>
<b>TOTAL EXPENDITURES</b>	<b>1,217,231</b>	<b>1,303,700</b>	<b>1,300,600</b>

**OAKLAND SCHOOLS SCHOOL ACTIVITIES FUND BUDGET  
SCHOOL ACTIVITIES FUND 290  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>FUND EQUITY, BEGINNING OF YEAR</b>			
Committed	257,366	268,600	268,600
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>257,366</b>	<b>268,600</b>	<b>268,600</b>
<b>REVENUE</b>			
Local Source Revenue - Other School Activity Income	214,318	180,000	180,000
<b>TOTAL REVENUE</b>	<b>214,318</b>	<b>180,000</b>	<b>180,000</b>
<b>TOTAL REVENUE AND BEGINNING BALANCE</b>	<b>471,684</b>	<b>448,600</b>	<b>448,600</b>
<b>EXPENDITURES</b>			
Expenditures - Other Support Services	203,037	180,000	180,000
<b>TOTAL EXPENDITURES</b>	<b>203,037</b>	<b>180,000</b>	<b>180,000</b>
<b>FUND EQUITY, END OF YEAR</b>			
Committed	268,647	268,600	268,600
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>471,684</b>	<b>448,600</b>	<b>448,600</b>

**OAKLAND SCHOOLS DEBT SERVICE FUND BUDGET  
2016 REFUNDING BONDS DEBT SERVICE FUND 311  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>FUND EQUITY, BEGINNING OF YEAR</b>			
Restricted	7,643,125	8,843,000	10,039,300
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>7,643,125</b>	<b>8,843,000</b>	<b>10,039,300</b>
<b>REVENUE</b>			
Interest Earned/Unrealized Gain (Loss)	364,257	360,000	288,000
Operating Transfer In - CFE	3,300,000	3,300,000	3,300,000
<b>TOTAL REVENUE</b>	<b>3,664,257</b>	<b>3,660,000</b>	<b>3,588,000</b>
<b>TOTAL REVENUE AND BEGINNING BALANCE</b>	<b>11,307,382</b>	<b>12,503,000</b>	<b>13,627,300</b>
<b>EXPENDITURES</b>			
Principal - Serial Bonds	1,535,000	1,610,000	1,690,000
Interest On Serial Bonds	928,900	852,200	771,700
Professional Services Fees	500	1,500	1,500
<b>TOTAL EXPENDITURES</b>	<b>2,464,400</b>	<b>2,463,700</b>	<b>2,463,200</b>
<b>FUND EQUITY, END OF YEAR</b>			
Restricted	8,842,982	10,039,300	11,164,100
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>8,842,982</b>	<b>10,039,300</b>	<b>11,164,100</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>11,307,382</b>	<b>12,503,000</b>	<b>13,627,300</b>

**OAKLAND SCHOOLS DEBT SERVICE FUND BUDGET**  
**2010 QSCB DEFEASEMENT FUND 313**  
**FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
FUND EQUITY, BEGINNING OF YEAR			
Restricted	533,029	1,214,400	460,900
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>533,029</b>	<b>1,214,400</b>	<b>460,900</b>
REVENUE			
Interest Earned	53,014	19,000	15,200
Operating Transfer In - GEF	105,900	-	-
Operating Transfer In - SEF	98,200	-	-
Operating Transfer In - CFE	915,100	-	-
Operating Transfer In - ONE Fund	160,800	-	-
Operating Transfer In - CPF 406	120,000	-	-
<b>TOTAL REVENUE</b>	<b>1,453,014</b>	<b>19,000</b>	<b>15,200</b>
<b>TOTAL REVENUE AND BEGINNING BALANCE</b>	<b>1,986,043</b>	<b>1,233,400</b>	<b>476,100</b>
EXPENDITURES			
Professional Services Fees	1,600	2,500	2,500
Transfer to DSF 314	770,000	770,000	473,600
<b>TOTAL EXPENDITURES</b>	<b>771,600</b>	<b>772,500</b>	<b>476,100</b>
FUND EQUITY, END OF YEAR			
Restricted	1,214,443	460,900	-
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>1,214,443</b>	<b>460,900</b>	<b>-</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>1,986,043</b>	<b>1,233,400</b>	<b>476,100</b>

**OAKLAND SCHOOLS DEBT SERVICE FUND BUDGET  
2010 QSCB CONSTRUCTION RESERVE FUND 314  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>FUND EQUITY, BEGINNING OF YEAR</b>			
Restricted	11,628,148	12,943,200	13,588,400
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>11,628,148</b>	<b>12,943,200</b>	<b>13,588,400</b>
<b>REVENUE</b>			
Interest Earned / Unrealized Gain (Loss) on Investments	710,912	40,000	902,800
Federal Interest Subsidy	761,683	762,700	762,700
Operating Transfer In - Fund 313 QSCB Defeasement Fund	770,000	770,000	473,600
<b>TOTAL REVENUE</b>	<b>2,242,595</b>	<b>1,572,700</b>	<b>2,139,100</b>
<b>TOTAL REVENUE AND BEGINNING BALANCE</b>	<b>13,870,743</b>	<b>14,515,900</b>	<b>15,727,500</b>
<b>EXPENDITURES</b>			
Principal on Term Bond	-	-	14,800,000
Interest on Term Bond	925,000	925,000	925,000
Professional Services Fees	2,500	2,500	2,500
<b>TOTAL EXPENDITURES</b>	<b>927,500</b>	<b>927,500</b>	<b>15,727,500</b>
<b>FUND EQUITY, END OF YEAR</b>			
Restricted	12,943,243	13,588,400	-
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>12,943,243</b>	<b>13,588,400</b>	<b>-</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>13,870,743</b>	<b>14,515,900</b>	<b>15,727,500</b>

**OAKLAND SCHOOLS CAPITAL PROJECTS FUND BUDGET**  
**CFE CAMPUS RENOVATIONS CAPITAL PROJECTS FUND - FUND 404**  
**FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>FUND EQUITY, BEGINNING OF YEAR</b>			
Non-Spendable for Prepaids, Inventory, & Deposits Committed	39,008 24,692,790	18,700 23,622,400	18,700 17,089,000
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>24,731,798</b>	<b>23,641,100</b>	<b>17,107,700</b>
<b>REVENUE</b>			
Interest Earned - Non Bond Proceeds Operating Transfer In - GEF Operating Transfer In - CFEF	824,218 1,100,000 9,000,000	740,000 - 10,100,000	592,000 - 8,800,000
<b>TOTAL REVENUE</b>	<b>10,924,218</b>	<b>10,840,000</b>	<b>9,392,000</b>
<b>TOTAL REVENUE AND BEGINNING BALANCE</b>	<b>35,656,016</b>	<b>34,481,100</b>	<b>26,499,700</b>
<b>EXPENDITURES</b>			
Expenditures	12,014,926	17,373,400	16,508,100
<b>TOTAL EXPENDITURES</b>	<b>12,014,926</b>	<b>17,373,400</b>	<b>16,508,100</b>
<b>FUND EQUITY, END OF YEAR</b>			
Non-Spendable for Prepaids, Inventory, & Deposits Committed	18,656 23,622,434	18,700 17,089,000	18,700 9,972,900
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>23,641,090</b>	<b>17,107,700</b>	<b>9,991,600</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>35,656,016</b>	<b>34,481,100</b>	<b>26,499,700</b>

**OAKLAND SCHOOLS CAPITAL PROJECTS FUND  
CFE CAMPUS RENOVATIONS CAPITAL PROJECTS FUND - FUND 404  
FISCAL YEAR 2026-27**

<b>PROGRAM DESCRIPTION</b>	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>PHASE I CONSTRUCTION/RENOVATIONS</b>			
261 4110 Land & Buildings Repair/Maintenance	7,833	-	-
261 4220 Equipment Rental	627	-	-
456 3190 Other Professional & Technology Services	47,026	16,000	-
456 3191 Plan Review Fees	35,900	-	-
456 5990 Misc. Supplies	6,788	-	-
456 6220 Trade Contracts	5,248,204	-	-
456 6221 Building Alterations - Roofs	1,717,559	-	-
456 6224 AE Consulting Fees	67,812	-	-
456 6227 CM General Conditions	557,082	-	-
456 6229 CM Fees	208,567	-	-
456 6232 Construction Contingency	22,900	-	-
456 6410 New Furniture & Equipment	295,121	18,500	-
456 6411 Technology Equipment	130,050	-	-
<b>TOTAL PHASE I CONSTRUCTION/RENOVATIONS</b>	<b>8,345,469</b>	<b>34,500</b>	<b>-</b>
<b>PHASE II CONSTRUCTION/RENOVATIONS</b>			
284 6421 Equipment/Computers		6,800	-
456 6220 Trade Contracts	506,030	2,865,200	60,000
456 6224 AE Consulting Fees	240,743	151,600	-
456 6227 CM General Conditions	211,674	434,700	-
456 6229 CM Fees	24,940	91,200	-
456 6232 Construction Contingency	-	174,600	-
456 6411 Technology Equipment		33,200	-
<b>TOTAL PHASE II CONSTRUCTION/RENOVATIONS</b>	<b>983,387</b>	<b>3,757,300</b>	<b>60,000</b>
<b>PARKING LOT/GATE ACCESS RENOVATIONS</b>			
452 3191 Other Professional & Technology Services	7,166	108,000	-
452 6310 Improvements other than Building	587,777	3,845,800	50,000
452 6311 CM General Conditions	173,921	464,700	-
452 6312 CM Fees	17,633	115,800	-
452 6313 Construction Contingency	-	13,300	-
452 6314 AE Consulting Fees	56,446	33,800	-
<b>TOTAL PARKING LOT/GATE ACCESS RENOVATIONS</b>	<b>842,943</b>	<b>4,581,400</b>	<b>50,000</b>
<b>SAFETY &amp; SECURITY UPGRADES</b>			
456 6220 Trade Contracts	-	-	1,800,000
<b>TOTAL SAFETY &amp; SECURITY UPGRADES</b>	<b>-</b>	<b>-</b>	<b>1,800,000</b>
<b>OSTC-SE ROOFTOP UNIT REPLACEMENTS</b>			
456 3191 Other Professional & Technology Services	-	25,300	25,300
456 6220 Trade Contracts	-	2,529,900	2,529,900
456 6224 AE Consulting Fees	-	410,000	410,000
456 6227 CM General Conditions	-	207,500	207,500
456 6229 CM Fees	-	74,900	74,900
456 6232 Construction Contingency	-	253,000	253,000
456 6233 Owners Contingency	-	309,400	309,400
<b>TOTAL OSTC-SE ROOFTOP UNIT REPLACEMENTS</b>	<b>-</b>	<b>3,810,000</b>	<b>3,810,000</b>

**OAKLAND SCHOOLS CAPITAL PROJECTS FUND  
CFE CAMPUS RENOVATIONS CAPITAL PROJECTS FUND - FUND 404  
FISCAL YEAR 2026-27**

<b>PROGRAM DESCRIPTION</b>	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>FACILITIES RENOVATIONS/REPAIRS</b>			
261 4110 Land & Building Repair/Maintenance	40,181	-	-
261 4220 Equipment Rental	14,917	-	-
261 6510 New Vehicles	361,615	470,800	-
284 4120 Software Maintenance Agreements	-	8,700	27,700
284 6410 Technology Equipment	-	486,000	486,000
284 6421 Equipment/Computers	556,774	1,069,200	1,563,000
456 3190 Other Professional & Technology Services	1,704	10,000	10,000
456 6220 Trade Contracts	37,240	1,249,800	835,800
456 6224 AE Consulting Fees	14,978	100,000	100,000
456 6410 New Furniture & Equipment - Depreciable	599,353	657,400	1,300,000
456 6411 Technology Equipment	20,352	18,800	18,800
456 6420 New Equipment & Furniture - Non-Depreciable	31,460	40,000	40,000
<b>TOTAL FACILITIES RENOVATIONS/REPAIRS</b>	<b>1,678,574</b>	<b>4,110,700</b>	<b>4,381,300</b>
<b>INSTRUCTIONAL CAPITAL &amp; STEMi</b>			
456 6220 Robotics Building Alterations	-	-	1,000,000
456 6220 NAIS Building Alterations	-	650,600	4,900,000
456 6410 NAIS New Furniture & Equipment - Depreciable	-	49,400	-
456 6410 New Furniture & Equipment - Depreciable	141,070	179,500	306,800
459 XXXX STEMi Mobile Classroom	23,483	200,000	200,000
<b>TOTAL INSTRUCTIONAL CAPITAL AND STEMi</b>	<b>164,553</b>	<b>1,079,500</b>	<b>6,406,800</b>
<b>TOTAL EXPENDITURES</b>	<b>12,014,926</b>	<b>17,373,400</b>	<b>16,508,100</b>

**OAKLAND SCHOOLS CAPITAL PROJECTS FUND BUDGET  
ADMINISTRATION BUILDING RENOVATIONS - FUND 406  
FISCAL YEAR 2026-27**

**\*Activity Based Cost Allocation 50% GEF, 24% SEF, 26% CFEF**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>FUND EQUITY, BEGINNING OF YEAR</b>			
Non-Spendable for Prepaids, Inventory, & Deposits	68,264	32,700	32,700
Committed	11,283,820	14,674,000	11,075,200
<b>TOTAL FUND EQUITY, BEGINNING OF YEAR</b>	<b>11,352,084</b>	<b>14,706,700</b>	<b>11,107,900</b>
<b>REVENUE</b>			
Interest Earned	570,633	540,000	432,000
Operating Transfer In - GEF	3,200,000	200,000	200,000
Operating Transfer In - SEF	96,000	96,000	96,000
Operating Transfer In - CFEF	104,000	104,000	104,000
<b>TOTAL REVENUE</b>	<b>3,970,633</b>	<b>940,000</b>	<b>832,000</b>
<b>TOTAL REVENUE AND BEGINNING BALANCE</b>	<b>15,322,717</b>	<b>15,646,700</b>	<b>11,939,900</b>
<b>EXPENDITURES</b>			
Expenditures	616,035	4,538,800	5,261,100
<b>TOTAL EXPENDITURES</b>	<b>616,035</b>	<b>4,538,800</b>	<b>5,261,100</b>
<b>FUND EQUITY, END OF YEAR</b>			
Non-Spendable for Prepaids, Inventory, & Deposits	32,648	32,700	32,700
Committed	14,674,034	11,075,200	6,646,100
<b>TOTAL FUND EQUITY, END OF YEAR</b>	<b>14,706,682</b>	<b>11,107,900</b>	<b>6,678,800</b>
<b>TOTAL EXPEND AND ENDING BALANCE</b>	<b>15,322,717</b>	<b>15,646,700</b>	<b>11,939,900</b>

**OAKLAND SCHOOLS CAPITAL PROJECTS FUND BUDGET  
ADMINISTRATION BUILDING RENOVATIONS - FUND 406  
FISCAL YEAR 2026-27  
\*Activity Based Cost Allocation 50% GEF, 24% SEF, 26% CFEF**

PROGRAM DESCRIPTION				FY 2025 ACTUAL	FY 2026 AMENDMENT 2 TOTALS	FY 2027 PROPOSED BUDGET
<b>ROOF REPLACEMENT</b>						
456	4100	6221	Building Improvements	109,500	921,300	-
456	4200	6221	Building Improvements	52,560	442,200	-
456	4600	6221	Building Improvements	56,940	479,100	-
456	4100	6224	A/E Consulting Fees - Roof	8,000	-	-
456	4200	6224	A/E Consulting Fees - Roof	3,840	-	-
456	4600	6224	A/E Consulting Fees - Roof	4,160	-	-
456	4100	6227	CM General Conditions	23,315	53,200	-
456	4200	6227	CM General Conditions	11,191	25,500	-
456	4600	6227	CM General Conditions	12,124	27,700	-
456	4100	6229	CM Fees	5,854	27,600	-
456	4200	6229	CM Fees	2,810	13,300	-
456	4600	6229	CM Fees	3,044	14,400	-
<b>TOTAL ROOF REPLACEMENT</b>				<b>293,338</b>	<b>2,004,300</b>	<b>-</b>
<b>HVAC REPLACEMENT</b>						
456	4100	6224	AE Consulting Fees	-	40,700	40,700
456	4200	6224	AE Consulting Fees	-	19,500	19,500
456	4600	6224	AE Consulting Fees	-	21,100	21,100
<b>TOTAL HVAC REPLACEMENT</b>				<b>-</b>	<b>81,300</b>	<b>81,300</b>
<b>CHILLER REPLACEMENT</b>						
456	4100	3190	Other Professional & Technical Services	-	800	4,600
456	4200	3190	Other Professional & Technical Services	-	400	2,200
456	4600	3190	Other Professional & Technical Services	-	400	2,400
456	4100	6220	Trade Contracts	-	60,400	342,500
456	4200	6220	Trade Contracts	-	29,000	164,400
456	4600	6220	Trade Contracts	-	31,400	178,100
456	4100	6224	AE Consulting Fees	-	18,700	18,700
456	4200	6224	AE Consulting Fees	-	9,000	9,000
456	4600	6224	AE Consulting Fees	-	9,700	9,700
456	4100	6227	CM General Conditions	-	9,700	54,800
456	4200	6227	CM General Conditions	-	4,600	26,300
456	4600	6227	CM General Conditions	-	5,000	28,500
456	4100	6229	CM Fees	-	2,500	14,000
456	4200	6229	CM Fees	-	1,200	6,700
456	4600	6229	CM Fees	-	1,300	7,300
456	4100	6232	Construction Contingency	-	12,100	68,500
456	4200	6232	Construction Contingency	-	5,800	32,900
456	4600	6232	Construction Contingency	-	6,300	35,600
456	4100	6233	Owners Contingency	-	79,500	450,600
456	4200	6233	Owners Contingency	-	38,200	216,200
456	4600	6233	Owners Contingency	-	41,300	234,300
<b>TOTAL CHILLER REPLACEMENT</b>				<b>-</b>	<b>367,300</b>	<b>1,907,300</b>
<b>AV UPGRADES</b>						
284	4100	6224	AE Consulting Fees	-	47,500	5,000
284	4200	6224	AE Consulting Fees	-	22,800	2,400
284	4600	6224	AE Consulting Fees	-	24,700	2,600
284	4100	6410	New Furniture & Equipment - Depreciable	-	500,000	50,000
284	4200	6410	New Furniture & Equipment - Depreciable	-	240,000	24,000
284	4600	6410	New Furniture & Equipment - Depreciable	-	260,000	26,000
<b>TOTAL AV UPGRADES</b>				<b>-</b>	<b>1,095,000</b>	<b>110,000</b>
<b>SAFETY &amp; SECURITY UPGRADES</b>						
456	4100	6220	Trade Contracts	-	-	250,000
456	4200	6220	Trade Contracts	-	-	120,000
456	4600	6220	Trade Contracts	-	-	130,000
<b>TOTAL SAFETY &amp; SECURITY UPGRADES</b>				<b>-</b>	<b>-</b>	<b>500,000</b>

**OAKLAND SCHOOLS CAPITAL PROJECTS FUND BUDGET  
ADMINISTRATION BUILDING RENOVATIONS - FUND 406  
FISCAL YEAR 2026-27**

**\*Activity Based Cost Allocation 50% GEF, 24% SEF, 26% CFEF**

<b>PROGRAM DESCRIPTION</b>				<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>GENERAL CAPITAL PROJECTS</b>						
261	4100	4110	Land/Building Repair/Maintenance	31	-	-
261	4200	4110	Land/Building Repair/Maintenance	15	-	-
261	4600	4110	Land/Building Repair/Maintenance	16	-	-
284	4100	4120	Equipment Repair/Maintenance	13,320	2,100	32,800
284	4200	4120	Equipment Repair/Maintenance	6,394	1,000	15,700
284	4600	4120	Equipment Repair/Maintenance	6,927	1,100	17,000
284	4100	4140	Software Maintenance Agreements	-	1,100	1,100
284	4200	4140	Software Maintenance Agreements	-	500	500
284	4600	4140	Software Maintenance Agreements	-	600	600
284	4100	6410	New Furniture & Equipment - Depreciable	27,210	320,000	1,077,500
284	4200	6410	New Furniture & Equipment - Depreciable	13,773	153,600	517,200
284	4600	6410	New Furniture & Equipment - Depreciable	13,437	166,400	560,300
284	4100	6421	Technology Equipment - Non Depreciable	3,223	-	25,000
284	4200	6421	Technology Equipment - Non Depreciable	1,611	-	12,000
284	4600	6421	Technology Equipment - Non Depreciable	1,611	-	13,000
452	4100	6310	Improvements Other Than Building	-	5,000	30,000
452	4200	6310	Improvements Other Than Building	-	2,400	14,400
452	4600	6310	Improvements Other Than Building	-	2,600	15,600
456	4100	3190	Other Professional & Technical Services	1,500	1,500	1,500
456	4200	3190	Other Professional & Technical Services	720	700	700
456	4600	3190	Other Professional & Technical Services	780	800	800
456	4100	6220	Trade Contracts	2,027	156,100	141,900
456	4200	6220	Trade Contracts	973	74,900	68,100
456	4600	6220	Trade Contracts	5,107	81,200	73,800
456	4100	6410	New Furniture & Equipment - Depreciable	52,011	7,800	20,000
456	4200	6410	New Furniture & Equipment - Depreciable	24,965	3,900	9,600
456	4600	6410	New Furniture & Equipment - Depreciable	27,046	4,600	10,400
456	4100	6420	New Furniture & Equipment - Non Depreciable	-	1,500	1,500
456	4200	6420	New Furniture & Equipment - Non Depreciable	-	700	700
456	4600	6420	New Furniture & Equipment - Non Depreciable	-	800	800
<b>TOTAL GENERAL CAPITAL PROJECTS</b>				<b>202,697</b>	<b>990,900</b>	<b>2,662,500</b>
<b>OTHER EXPENDITURES</b>						
634	4100	8110	Transfer Out - QSCB Defeasement Fund 313	60,000	-	-
634	4200	8110	Transfer Out - QSCB Defeasement Fund 313	28,800	-	-
634	4600	8110	Transfer Out - QSCB Defeasement Fund 313	31,200	-	-
<b>TOTAL OTHER EXPENDITURES</b>				<b>120,000</b>	<b>-</b>	<b>-</b>
<b>TOTAL EXPENDITURES</b>				<b>616,035</b>	<b>4,538,800</b>	<b>5,261,100</b>

**OAKLAND SCHOOLS PRODUCTION PRINTING ENTERPRISE FUND - FUND 710**  
**REVENUE AND EXPENSE BUDGET**  
**FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
NET POSITION, BEGINNING OF YEAR			
Net Investment in Capital Assets	160,262	93,800	93,800
Restricted Net OPEB Asset	9,117	95,300	95,300
Unrestricted Net Position	(996,402)	(886,800)	(972,400)
<b>TOTAL NET POSITION, BEGINNING OF YEAR</b>	<b>(827,023)</b>	<b>(697,700)</b>	<b>(783,300)</b>
REVENUE			
LOCAL SOURCES			
Production Printing - External Services	561,128	350,000	350,000
Production Printing - Internal Services	385,248	430,000	430,000
Fingerprinting Revenue	83,689	65,000	65,000
Earning on Investment	12,548	7,800	6,000
Miscellaneous - Pension/OPEB Gain	126,729	-	-
<b>TOTAL LOCAL SOURCES</b>	<b>1,169,342</b>	<b>852,800</b>	<b>851,000</b>
STATE SOURCES			
Section 147a(2) MPSERS Normal Cost Offset	16,066	12,100	16,900
Section 147a(3) MPSERS Cost Offset ISDs & Districts	4,494	-	-
Section 147a(4) MPSERS Cost Offset - Reduced UAAL	23,798	-	-
Section 147c(1) MPSERS UAAL Rate Stabilization	43,769	38,900	37,800
Section 147c(2) MPSERS One Time Deposit	9,949	-	-
Section 27L4 Healthcare Offset	-	3,600	-
Section 147e MPSERS Employer DC Match	2,165	1,600	1,600
Section 147g MPSERS 3% Healthcare Reimbursement	7,089	-	-
<b>TOTAL STATE SOURCES</b>	<b>107,330</b>	<b>56,200</b>	<b>56,300</b>
OTHER FINANCING SOURCES			
Miscellaneous - Lease Transfer to GEF	79,688	-	-
<b>TOTAL OTHER FINANCING SOURCES</b>	<b>79,688</b>	<b>-</b>	<b>-</b>
<b>TOTAL OPERATING REVENUE</b>	<b>1,356,360</b>	<b>909,000</b>	<b>907,300</b>
<b>TOTAL OPERATING REVENUE AND BEG BALANCE</b>	<b>529,337</b>	<b>211,300</b>	<b>124,000</b>
OPERATING EXPENSES	1,226,990	994,600	1,088,500
<b>TOTAL OPERATING EXPENSES</b>	<b>1,226,990</b>	<b>994,600</b>	<b>1,088,500</b>
NET POSITION, END OF YEAR			
Net Investment in Capital Assets	93,840	93,800	93,800
Restricted Net OPEB Asset	95,319	95,300	95,300
Unrestricted Net Position	(886,812)	(972,400)	(1,153,600)
<b>TOTAL NET POSITION, END OF YEAR</b>	<b>(697,653)</b>	<b>(783,300)</b>	<b>(964,500)</b>

**OAKLAND SCHOOLS PRODUCTION PRINTING ENTERPRISE FUND - FUND 710**  
**EXPENSE BUDGET SUMMARY**  
**FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>OPERATING EXPENSES</b>			
<b><i>SALARIES</i></b>			
1170 Department Director	89,091	93,000	97,200
1620 Secretary/Clerical	170,840	178,900	181,900
1760 Compensated Absences	151	6,000	6,000
1841 Temporary Retirees	8,791	10,300	13,000
1990 Overtime Salaries	-	2,000	2,000
<b>SALARIES TOTAL</b>	<b>268,873</b>	<b>290,200</b>	<b>300,100</b>
<b><i>EMPLOYEE BENEFITS</i></b>			
2110 Life Insurance	195	200	200
2121 Long Term Disability	586	500	500
2122 Short Term Disability	814	800	1,100
2130 Group Health	65,959	77,600	78,400
2140 Dental Health Care	5,557	7,200	7,800
2150 Vision Care	525	500	600
2490 Other Prof Srvs For Employees	1,200	1,800	1,400
2820 Contributions To Retirement Funds	79,486	79,900	75,800
2821 Defined Contribution Employer Match	537	600	600
2823 Contributions To Retirement Funds - UAAL	43,769	38,900	37,800
2824 Contr To Retirement 147c2 UAAL	9,949	-	-
2825 MPSERS 147g 3% Health Reimb	7,089	-	-
2830 Social Security	19,933	20,700	21,400
2840 Workers Compensation	767	200	100
2920 Cash In Lieu of Benefits	792	-	-
<b>EMPLOYEE BENEFITS TOTAL</b>	<b>237,158</b>	<b>228,900</b>	<b>225,700</b>
<b><i>PURCHASED SERVICES</i></b>			
3140 Staff Services	60,359	53,100	62,000
3198 Other Technology & Professional Services	-	-	15,000
3210 Mileage Reimbursement	-	100	100
3430 Postage	207,282	60,000	60,000
3450 Copyright Fees/Software Licenses	13,018	14,500	14,500
3490 Other Misc Communication	-	200	200
4120 Equipment Repair/Maintenance	93,903	84,600	90,000
4140 Software Maintenance Agreement	-	5,400	5,400
<b>PURCHASED SERVICES TOTAL</b>	<b>374,562</b>	<b>217,900</b>	<b>247,200</b>
<b><i>SUPPLIES &amp; OTHER</i></b>			
259 5690 Other Resale	175,471	110,000	110,000
259 5990 Misc Supplies/Materials	7,261	11,000	11,000
259 7410 Dues & Fees	4,479	4,000	9,000
259 7910 Miscellaneous	696	-	-
259 9990 Indirect	32,300	26,700	28,000
284 4120 Equipment Repair/Maintenance	-	-	1,000
284 6410 Tech Service Equipment - Depreciable	1,908	10,000	43,000
284 6421 New Equipment/Furniture - Non-Depreciable	289	-	8,000
711 7710 Amortization & Depreciation	42,743	38,000	39,600
<b>SUPPLIES &amp; OTHER TOTAL</b>	<b>265,147</b>	<b>199,700</b>	<b>249,600</b>

**OAKLAND SCHOOLS PRODUCTION PRINTING ENTERPRISE FUND - FUND 710  
 EXPENSE BUDGET SUMMARY  
 FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>OPERATING EXPENSES</b>			
<i><b>FACILITIES</b></i>			
261 3190 Other Professional & Technology Services	2,572	2,700	3,000
261 3410 Telephone	153	500	500
261 3830 Water & Sewage	1,292	900	1,400
261 3840 Waste & Trash Disposal	870	300	800
261 3910 Property & Liability	3,823	4,100	4,800
261 4110 Land/Building Repair & Maintenance	16,228	9,300	14,500
261 4111 Land/Building Repair & Maintenance	7,943	1,700	2,500
261 5510 Natural Gas	6,285	4,300	3,400
261 5520 Electricity	31,829	24,000	18,700
261 5990 Misc Supplies/Materials	41	300	600
261 6410 New Equipment/Furniture - Depreciable	10,214	5,900	11,800
261 6420 New Equipment/Furniture - Non-Depreciable	-	3,900	3,900
<b>FACILITIES TOTAL</b>	<b>81,250</b>	<b>57,900</b>	<b>65,900</b>
<b>TOTAL OPERATING EXPENSES</b>	<b>1,226,990</b>	<b>994,600</b>	<b>1,088,500</b>

**OAKLAND SCHOOLS INTERNAL SERVICES FUND BUDGET  
RISK RELATED ACTIVITY FUND - FUND 810  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>NET POSITION, BEGINNING OF YEAR</b>			
Claim Fluctuation Reserve - Health Care Insurance	100,000	-	-
Claim Fluctuation Reserve - Dental Insurance	276,800	-	-
Claim Fluctuation Reserve - Vision Insurance	31,000	-	-
Claim Fluctuation Reserve - Life Insurance	1,800	-	-
Claim Fluctuation Reserve - Short/Long Term Disability Insurance	11,800	-	-
Claim Fluctuation Reserve - Workers Compensation Insurance	35,000	-	-
Claim Fluctuation Reserve - Unemployment Insurance	50,000	-	-
Claim Fluctuation Reserve - General Liability Insurance	1,500	-	-
Claim Fluctuation Reserve - Errors & Omissions Insurance	300	-	-
Claim Fluctuation Reserve - Professional Liability	720,000	1,240,000	1,280,000
Claim Fluctuation Reserve - Cyber Liability	1,000,000	1,278,400	1,278,400
Claim Fluctuation Reserve - Building, Vehicle & Other Insurance	7,900	-	-
Contingency Reserve - W/C Settlements	100,000	-	-
Contingency Reserve - P/C Settlements	72,900	50,000	50,000
Contingency Reserve - Wellbeing	-	-	-
Unrestricted Net Position	402,698	374,500	473,200
<b>TOTAL NET POSITION, BEGINNING OF YEAR</b>	<b>2,811,698</b>	<b>2,942,900</b>	<b>3,081,600</b>
<b>REVENUE</b>			
Compensated Absences	554,450	600,000	600,000
Healthcare Contribution	6,893,034	7,000,000	7,404,500
Health Insurance Opt Out	326,241	323,600	567,500
Health Insurance Non-Cap/Other	176,800	213,300	203,300
Dental Contribution	758,586	829,600	985,400
Vision Contribution	67,884	63,100	66,600
Life Insurance Contribution	38,852	41,800	46,100
LTD Insurance Contribution	113,288	120,200	107,400
STD Insurance Contribution	134,111	134,700	187,700
Worker Compensation Contribution	109,540	36,500	50,000
Unemployment Contribution	2,215	23,000	23,000
General Liability Contribution	37,675	43,000	47,300
Errors & Omissions Liability Contribution	6,877	8,200	9,000
Professional Liability Contribution	40,000	40,000	40,000
Building, Vehicle, & Other Insurance Contribution	169,816	169,100	186,000
Cyber Liability Contribution	111,225	111,200	122,300
Investment Income	223,016	200,000	160,000
<b>TOTAL REVENUE</b>	<b>9,763,610</b>	<b>9,957,300</b>	<b>10,806,100</b>

**OAKLAND SCHOOLS INTERNAL SERVICES FUND BUDGET  
RISK RELATED ACTIVITY FUND - FUND 810  
FISCAL YEAR 2026-27**

	<b>FY 2025 ACTUAL</b>	<b>FY 2026 AMENDMENT 2 TOTALS</b>	<b>FY 2027 PROPOSED BUDGET</b>
<b>EXPENSES</b>			
Compensated Absences	556,525	600,000	600,000
Health Insurance	6,893,031	7,000,000	7,404,500
Health Insurance Opt Out	326,241	323,600	567,500
Benefits Specialist	125,122	134,900	136,000
Wellbeing Program	68,702	84,600	81,200
Benefits Administration	48,979	80,000	63,100
Dental Insurance	758,586	829,600	985,400
Vision Insurance	67,883	63,100	66,600
Life Insurance	38,914	41,800	46,100
LTD Insurance	114,425	120,200	107,400
STD Insurance	132,969	134,700	187,700
Worker Compensation Insurance	109,540	36,600	50,000
Unemployment	2,215	23,000	23,000
Other Professional & Technical Services - OSTC Nurses	61,683	-	-
General Liability Insurance	37,676	43,000	47,300
Errors & Omissions Liability Insurance	6,877	8,200	9,000
Building, Vehicle, & Other Insurance	169,815	169,100	186,000
Cyber Insurance	111,225	111,200	122,300
Safety Program	1,968	15,000	18,400
<b>TOTAL EXPENSES</b>	<b>9,632,376</b>	<b>9,818,600</b>	<b>10,701,500</b>
<b>NET OPERATING PROFIT (LOSS)</b>	<b>131,234</b>	<b>138,700</b>	<b>104,600</b>
<b>NET POSITION, END OF YEAR</b>			
Claim Fluctuation Reserve - Professional Liability	1,240,000	1,280,000	1,320,000
Claim Fluctuation Reserve - Cyber Liability	1,278,400	1,278,400	1,278,400
Contingency Reserve - P/C Settlements	50,000	50,000	50,000
Unrestricted Net Position	374,532	473,200	537,800
<b>TOTAL NET POSITION, END OF YEAR</b>	<b>2,942,932</b>	<b>3,081,600</b>	<b>3,186,200</b>

Oakland Schools 5 Year Capital Plan

Oakland Schools Capital Outlay Needs 5-Year Plan by Funding Source	Fund Number	Ending Fund Balance 6/30/2025	Projected Needs 2025-26	Projected Needs 2026-27	Projected Needs 2027-28	Projected Needs 2028-29	Projected Needs 2029-30	Projected Needs 2030-31	Total Projected Needs FY26-FY31	Net Transfers FY26-FY31	Estimated Fund Balance Surplus (Deficit) 6/30/2031
I.T. Refresh/Capital Projects GEF (A)	100	N/A	\$ 450,000	\$ 895,000	\$ 225,000	\$ 100,000	\$ 100,000	\$ 196,000	\$ 1,966,000	\$ -	N/A
I.T. Refresh/Capital Projects SEF (A)	200	N/A	\$ 225,000	\$ 97,500	\$ 112,500	\$ 50,000	\$ 50,000	\$ 98,000	\$ 633,000	\$ -	N/A
I.T. Refresh/Capital Projects CFEF (A)	600	N/A	\$ 225,000	\$ 97,500	\$ 112,500	\$ 50,000	\$ 50,000	\$ 98,000	\$ 633,000	\$ -	N/A
Special Ed Assistive Tech & Other Capital Needs	200	N/A	\$ 300,000	\$ 300,000	\$ 300,000	\$ 300,000	\$ 300,000	\$ 300,000	\$ 1,800,000	\$ -	N/A
Summit	200/273/710	N/A	\$ 951,000	\$ 480,000	\$ 967,000	\$ 117,000	\$ 31,000	\$ 34,000	\$ 2,580,000	\$ -	N/A
O.N.E.	271	N/A	\$ -	\$ -	\$ 2,000,000	\$ -	\$ -	\$ -	\$ 2,000,000	\$ -	N/A
VLAC K-8 & 9-12	270	N/A	\$ 80,000	\$ 195,000	\$ 80,000	\$ 80,000	\$ 80,000	\$ 80,000	\$ 595,000	\$ -	N/A
ACE	270	N/A	\$ 20,000	\$ 55,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 155,000	\$ -	N/A
Capital Projects CFEF	404	\$ 23,641,100	\$ 19,947,600	\$ 16,110,800	\$ 11,936,300	\$ 11,571,900	\$ 3,928,000	\$ 2,573,400	\$ 66,068,000	\$ 51,000,000	\$ 8,573,100
Capital Projects Admin Bldg	406	\$ 14,706,700	\$ 4,516,700	\$ 5,119,500	\$ 1,340,900	\$ 1,256,000	\$ 815,600	\$ 1,831,000	\$ 14,879,700	\$ 2,400,000	\$ 2,227,000
PP&G	710*	\$ (697,700)	\$ 162,000	\$ 43,000	\$ 130,800	\$ 98,000	\$ 144,300	\$ 150,000	\$ 728,100	\$ -	\$ (1,425,800)
<b>Totals</b>			<b>\$ 26,877,300</b>	<b>\$ 23,393,300</b>	<b>\$ 17,225,000</b>	<b>\$ 13,642,900</b>	<b>\$ 5,518,900</b>	<b>\$ 5,380,400</b>	<b>\$ 92,037,800</b>	<b>\$ 53,400,000</b>	<b>\$ 9,374,300</b>

\*PPG fund balance includes the impact of GASB 68/75

Oakland Schools 5 Year Capital Plan

Oakland Schools Capital Outlay 5-Year Plan School Fiscal Years 2027-31		2027								
		Main	NE	NW	SE	SW			Instr/Curr	2027
		Campus	Campus	Campus	Campus	Campus	PP&G	Summit	Programs	TOTAL
Facilities Projects	HVAC Upgrades	\$ 81,300								\$ 81,300
	Chiller	\$ 1,907,400								\$ 1,907,400
	Lighting & Energy Efficiency Upgrades	\$ 31,800	\$ 53,800	\$ 45,400	\$ 42,600	\$ 43,000				\$ 216,600
	Painting		\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000				\$ 140,000
	Parking Lot Repaving			\$ 25,000		\$ 25,000				\$ 50,000
	Phase I Sec. Ent. (Security, Card Access, Fire)									\$ -
	Phase II (Painting, Floors, Aesthetics)		\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000				\$ 60,000
	Roof Replacement									\$ -
	Safety/Security	\$ 500,000	\$ 500,000	\$ 500,000	\$ 500,000	\$ 500,000		\$ 250,000		\$ 2,750,000
	SE RTUs				\$ 3,810,000					\$ 3,810,000
Summit Reconfig									\$ -	
Facilities Operations Routine Maintenance	A&E Consulting Fees		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	Asphalt Repairs	\$ 50,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 70,000
	Building Updates	\$ 160,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 260,000
	Concrete Repairs/Replacement/Leveling	\$ 10,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 30,000
	Custodial/Maintenance Equipment		\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000				\$ 60,000
	Electrical Updates	\$ 5,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000				\$ 45,000
	Exterior - Brick Tuck-Pointing									\$ -
	Flooring Updates	\$ 25,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000				\$ 65,000
	Furniture/Equipment	\$ 40,000	\$ 35,000	\$ 35,000	\$ 35,000	\$ 35,000		\$ 5,000		\$ 185,000
	Grounds	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000				\$ 10,000
	HVAC Maintenance	\$ 30,000	\$ 25,000	\$ 28,000	\$ 25,000	\$ 25,000				\$ 133,000
	Lighting & Energy Maintenance	\$ 2,000								\$ 2,000
	Plumbing	\$ 10,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000				\$ 70,000
	Program Refresh		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	Roof Repair		\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 20,000
	Safety/Security	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000				\$ 50,000
Vehicles									\$ -	
	Sub-total Facilities Operations	\$ 2,864,500	\$ 815,800	\$ 835,400	\$ 4,614,600	\$ 830,000	\$ -	\$ 255,000	\$ -	\$ 10,215,300
PP&G	Production Print & Graphics									\$ -
	Sub-total PP&G	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Student Services & Special Pops	ACE								\$ 55,000	\$ 55,000
	Program Refresh (Instructional Equipment)		\$ 63,000	\$ 63,000	\$ 63,000	\$ 63,000				\$ 252,000
	Repair/Replacement		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	STEMi				\$ 200,000					\$ 200,000
	NAIS Build (SE)			\$ 4,900,000						\$ 4,900,000
	NAIS Equipment			\$ 1,000,000						\$ 1,000,000
	Robotics (Location TBD)					\$ 1,000,000				\$ 1,000,000
	Special Ed Assistive Tech + Other Cap Needs								\$ 300,000	\$ 300,000
VLAC K-8/ 9-12								\$ 195,000	\$ 195,000	
	Sub-total Student Services	\$ -	\$ 88,000	\$ 5,988,000	\$ 288,000	\$ 1,088,000	\$ -	\$ -	\$ 550,000	\$ 8,002,000
Technology Services	Audio Video Equipment Upgrades	\$ 100,000								\$ 100,000
	Battery Replacements (UPS for Data Center)	\$ 120,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 1,000	\$ 2,000		\$ 203,000
	Cabling Services	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 5,000	\$ 20,000		\$ 275,000
	CFEF Desktops/Laptops/Labs		\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000				\$ 400,000
	CFEF Mobile Devices		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	CFEF Network Electronics									\$ -
	Communications Channel	\$ 700,000								\$ 700,000
	Copier/Printer Replacements									\$ -
	Emerging Technologies (equip test/demo)	\$ 100,000								\$ 100,000
	ONE Network Electronics									\$ -
	OS Backup	\$ 195,000	\$ 21,000	\$ 18,000	\$ 21,000	\$ 21,000	\$ 3,000	\$ 21,000		\$ 300,000
	OS Desktops/Laptops/Labs/Mobile Devices	\$ 390,000					\$ 8,000			\$ 398,000
	OS Network Electronics	\$ 130,000	\$ 14,000	\$ 12,000	\$ 14,000	\$ 14,000	\$ 2,000	\$ 14,000		\$ 200,000
	OS SAN									\$ -
	OS Security (Firewalls/Filtering)	\$ 975,000	\$ 105,000	\$ 90,000	\$ 105,000	\$ 105,000	\$ 15,000	\$ 105,000		\$ 1,500,000
OS Servers Incl Virtual/OS Voice Upgrade	\$ 325,000	\$ 35,000	\$ 30,000	\$ 35,000	\$ 35,000	\$ 5,000	\$ 35,000		\$ 500,000	
OS Telecomm/Enterprise Software Licensing	\$ 260,000	\$ 28,000	\$ 24,000	\$ 28,000	\$ 28,000	\$ 4,000	\$ 28,000		\$ 400,000	
	Sub-total T.S.	\$ 3,345,000	\$ 398,000	\$ 369,000	\$ 398,000	\$ 398,000	\$ 43,000	\$ 225,000	\$ -	\$ 5,176,000
	<b>GRAND TOTAL</b>	<b>\$ 6,209,500</b>	<b>\$ 1,301,800</b>	<b>\$ 7,192,400</b>	<b>\$ 5,300,600</b>	<b>\$ 2,316,000</b>	<b>\$ 43,000</b>	<b>\$ 480,000</b>	<b>\$ 550,000</b>	<b>\$ 23,393,300</b>

Oakland Schools 5 Year Capital Plan

Oakland Schools Capital Outlay 5-Year Plan School Fiscal Years 2027-31		2028								
		Main	NE	NW	SE	SW			Instr/Curr	2028
		Campus	Campus	Campus	Campus	Campus	PP&G	Summit	Programs	TOTAL
Facilities Projects	HVAC Upgrades		\$ 1,566,000	\$ 525,200	\$ 150,000	\$ 197,000				\$ 2,438,200
	Chiller									
	Lighting & Energy Efficiency Upgrades		\$ 718,600	\$ 831,100	\$ 1,049,400	\$ 832,700				\$ 3,431,800
	Painting	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000				\$ 250,000
	Parking Lot Repaving									\$ -
	Phase I Sec. Ent. (Security, Card Access, Fire)									\$ -
	Phase II (Painting, Floors, Aesthetics)									\$ -
	Roof Replacement				\$ 1,151,000					\$ 1,151,000
	Safety/Security									\$ -
	SE RTUs									\$ -
Summit Reconfig							\$ 900,000		\$ 900,000	
Facilities Operations Routine Maintenance	A&E Consulting Fees		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	Asphalt Repairs	\$ 25,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 45,000
	Building Updates	\$ 50,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000				\$ 130,000
	Concrete Repairs/Replacement/Leveling	\$ 20,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 40,000
	Custodial/Maintenance Equipment		\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000				\$ 80,000
	Electrical Updates	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000				\$ 50,000
	Exterior - Brick Tuck-Pointing									\$ -
	Flooring Updates	\$ 50,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000				\$ 90,000
	Furniture/Equipment	\$ 25,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000		\$ 5,000		\$ 190,000
	Grounds		\$ 2,000	\$ 2,000	\$ 2,000	\$ 2,000				\$ 8,000
	HVAC Maintenance	\$ 50,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 150,000
	Lighting & Energy Maintenance	\$ 10,000								\$ 10,000
	Plumbing	\$ 10,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000				\$ 90,000
	Program Refresh	\$ -	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	Roof Repair		\$ 5,000	\$ 5,000		\$ 5,000				\$ 15,000
	Safety/Security	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000		\$ 10,000		\$ 60,000
	Vehicles									\$ -
Sub-total Facilities Operations	\$ 310,000	\$ 2,556,600	\$ 1,628,300	\$ 2,617,400	\$ 1,301,700	\$ -	\$ 915,000	\$ -	\$ 9,329,000	
PP&G	Production Print & Graphics						\$ 90,000		\$ 90,000	
	Sub-total PP&G	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 90,000	\$ -	\$ 90,000	
Student Services & Special Pops	ACE							\$ 20,000	\$ 20,000	
	Program Refresh (Instructional Equipment)		\$ 63,000	\$ 63,000	\$ 63,000	\$ 63,000			\$ 252,000	
	Repair/Replacement		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000			\$ 100,000	
	STEMi				\$ 200,000				\$ 200,000	
	NAIS Build (SE)								\$ -	
	NAIS Equipment								\$ -	
	Robotics (Location TBD)					\$ 2,000,000			\$ 2,000,000	
	Special Ed Assistive Tech + Other Cap Needs							\$ 300,000	\$ 300,000	
VLAC K-8/ 9-12							\$ 80,000	\$ 80,000		
Sub-total Student Services	\$ -	\$ 88,000	\$ 88,000	\$ 288,000	\$ 2,088,000	\$ -	\$ -	\$ 400,000	\$ 2,952,000	
Technology Services	Audio Video Equipment Upgrades	\$ 100,000							\$ 100,000	
	Battery Replacements (UPS for Data Center)								\$ -	
	Cabling Services	\$ 1,000	\$ 500	\$ 500	\$ 500	\$ 500		\$ 1,000	\$ 4,000	
	CFEF Desktops/Laptops/Labs		\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000			\$ 400,000	
	CFEF Mobile Devices		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000			\$ 100,000	
	CFEF Network Electronics		\$ 143,600	\$ 143,800	\$ 143,800	\$ 143,800			\$ 575,000	
	Communications Channel	\$ -							\$ -	
	Copier/Printer Replacements								\$ -	
	Emerging Technologies (equip test/demo)	\$ 100,000							\$ 100,000	
	ONE Network Electronics	\$ 2,000,000							\$ 2,000,000	
	OS Backup								\$ -	
	OS Desktops/Laptops/Labs/Mobile Devices	\$ 450,000							\$ 450,000	
	OS Network Electronics	\$ 390,900				\$ 4,300	\$ 29,800		\$ 425,000	
	OS SAN								\$ -	
	OS Security (Firewalls/Filtering)	\$ 114,000	\$ 16,000	\$ 16,000	\$ 16,000	\$ 16,000	\$ 6,000	\$ 16,000	\$ 200,000	
OS Servers Incl Virtual/OS Voice Upgrade	\$ 325,000	\$ 35,000	\$ 30,000	\$ 35,000	\$ 35,000	\$ 5,000	\$ 35,000	\$ 500,000		
OS Telecomm/Enterprise Software Licensing								\$ -		
Sub-total T.S.	\$ 3,480,900	\$ 320,100	\$ 315,300	\$ 320,300	\$ 324,600	\$ 40,800	\$ 52,000	\$ -	\$ 4,854,000	
<b>GRAND TOTAL</b>		<b>\$ 3,790,900</b>	<b>\$ 2,964,700</b>	<b>\$ 2,031,600</b>	<b>\$ 3,225,700</b>	<b>\$ 3,714,300</b>	<b>\$ 130,800</b>	<b>\$ 967,000</b>	<b>\$ 400,000</b>	<b>\$ 17,225,000</b>

Oakland Schools 5 Year Capital Plan

Oakland Schools Capital Outlay 5-Year Plan School Fiscal Years 2027-31		2029								
		Main	NE	NW	SE	SW			Instr/Curr	2029
		Campus	Campus	Campus	Campus	Campus	PP&G	Summit	Programs	TOTAL
Facilities Projects	HVAC Upgrades		\$ 1,566,100	\$ 1,383,900	\$ -	\$ 3,046,900				\$ 5,996,900
	Chiller									\$ -
	Lighting & Energy Efficiency Upgrades									\$ -
	Painting	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000				\$ 250,000
	Parking Lot Repaving									\$ -
	Phase I Sec. Ent. (Security, Card Access, Fire)									\$ -
	Phase II (Painting, Floors, Aesthetics)									\$ -
	Roof Replacement									\$ -
	Safety/Security									\$ -
	SE RTUs									\$ -
Summit Reconfig									\$ -	
Facilities Operations Routine Maintenance	A&E Consulting Fees		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	Asphalt Repairs	\$ 10,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 30,000
	Building Updates	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000		\$ 5,000		\$ 155,000
	Concrete Repairs/Replacement/Leveling	\$ 10,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 30,000
	Custodial/Maintenance Equipment		\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000				\$ 120,000
	Electrical Updates	\$ 40,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000				\$ 80,000
	Exterior - Brick Tuck-Pointing	\$ 5,000								\$ 5,000
	Flooring Updates	\$ 50,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000		\$ 40,000		\$ 130,000
	Furniture/Equipment	\$ 20,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000				\$ 180,000
	Grounds		\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 20,000
	HVAC Maintenance	\$ 70,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 170,000
	Lighting & Energy Maintenance	\$ 50,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000				\$ 90,000
	Plumbing	\$ 10,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000				\$ 90,000
	Program Refresh		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	Roof Repair		\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000				\$ 40,000
	Safety/Security	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000		\$ 5,000		\$ 55,000
Vehicles	\$ 180,000				\$ 65,000				\$ 245,000	
Sub-total Facilities Operations	\$ 535,000	\$ 1,876,100	\$ 1,693,900	\$ 310,000	\$ 3,421,900	\$ -	\$ 50,000	\$ -	\$ 7,886,900	
PP&G	Production Print & Graphics						\$ 90,000			\$ 90,000
	Sub-total PP&G	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 90,000	\$ -	\$ -	\$ 90,000
Student Services & Special Pops	ACE							\$ 20,000		\$ 20,000
	Program Refresh (Instructional Equipment)		\$ 63,000	\$ 63,000	\$ 63,000	\$ 63,000				\$ 252,000
	Repair/Replacement		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000		\$ 10,000		\$ 110,000
	STEMi				\$ 200,000					\$ 200,000
	NAIS Build (SE)									\$ -
	NAIS Equipment									\$ -
	Robotics (Location TBD)					\$ 3,000,000				\$ 3,000,000
	Special Ed Assistive Tech + Other Cap Needs							\$ 300,000		\$ 300,000
VLAC K-8/ 9-12							\$ 80,000		\$ 80,000	
Sub-total Student Services	\$ -	\$ 88,000	\$ 88,000	\$ 288,000	\$ 3,088,000	\$ -	\$ 10,000	\$ 400,000	\$ 3,962,000	
Technology Services	Audio Video Equipment Upgrades	\$ 100,000								\$ 100,000
	Battery Replacements (UPS for Data Center)									\$ -
	Cabling Services	\$ 1,000	\$ 500	\$ 500	\$ 500	\$ 500		\$ 1,000		\$ 4,000
	CFEF Desktops/Laptops/Labs		\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000				\$ 400,000
	CFEF Mobile Devices		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	CFEF Network Electronics									\$ -
	Communications Channel	\$ -								\$ -
	Copier/Printer Replacements									\$ -
	Emerging Technologies (equip test/demo)	\$ 100,000								\$ 100,000
	ONE Network Electronics									\$ -
	OS Backup									\$ -
	OS Desktops/Laptops/Labs/Mobile Devices	\$ 200,000								\$ 200,000
	OS Network Electronics									\$ -
	OS SAN	\$ 520,000	\$ 56,000	\$ 48,000	\$ 56,000	\$ 56,000	\$ 8,000	\$ 56,000		\$ 800,000
OS Security (Firewalls/Filtering)									\$ -	
OS Servers Incl Virtual/OS Voice Upgrade									\$ -	
OS Telecomm/Enterprise Software Licensing									\$ -	
Sub-total T.S.	\$ 921,000	\$ 181,500	\$ 173,500	\$ 181,500	\$ 181,500	\$ 8,000	\$ 57,000	\$ -	\$ 1,704,000	
<b>GRAND TOTAL</b>		<b>\$ 1,456,000</b>	<b>\$ 2,145,600</b>	<b>\$ 1,955,400</b>	<b>\$ 779,500</b>	<b>\$ 6,691,400</b>	<b>\$ 98,000</b>	<b>\$ 117,000</b>	<b>\$ 400,000</b>	<b>\$ 13,642,900</b>

Oakland Schools 5 Year Capital Plan

Oakland Schools Capital Outlay 5-Year Plan School Fiscal Years 2027-31		2030								
		Main	NE	NW	SE	SW			Instr/Curr	2030
		Campus	Campus	Campus	Campus	Campus	PP&G	Summit	Programs	TOTAL
Facilities Projects	HVAC Upgrades									\$ -
	Chiller									\$ -
	Lighting & Energy Efficiency Upgrades		\$ 206,600	\$ 197,800	\$ 169,300	\$ 216,000				\$ 789,700
	Painting		\$ 50,000	\$ 50,000	\$ 50,000	\$ 50,000	\$ 15,000			\$ 215,000
	Parking Lot Repaving									\$ -
	Phase I Sec. Ent. (Security, Card Access, Fire)									\$ -
	Phase II (Painting, Floors, Aesthetics)									\$ -
	Roof Replacement									\$ -
	Safety/Security									\$ -
	SE RTUs									\$ -
Summit Reconfig									\$ -	
Facilities Operations Routine Maintenance	A&E Consulting Fees		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	Asphalt Repairs	\$ 10,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 30,000
	Building Updates	\$ 10,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000				\$ 130,000
	Concrete Repairs/Replacement/Leveling		\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 20,000
	Custodial/Maintenance Equipment		\$ 22,000	\$ 22,000	\$ 22,000	\$ 22,000				\$ 88,000
	Electrical Updates	\$ 20,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000				\$ 60,000
	Exterior - Brick Tuck-Pointing									\$ -
	Flooring Updates	\$ 50,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000				\$ 90,000
	Furniture/Equipment	\$ 35,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 5,000			\$ 200,000
	Grounds									\$ -
	HVAC Maintenance	\$ 150,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 250,000
	Lighting & Energy Maintenance	\$ 50,000					\$ 30,000			\$ 80,000
	Plumbing	\$ 10,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000				\$ 90,000
	Program Refresh		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	Roof Repair		\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 20,000
	Safety/Security		\$ 238,700	\$ 23,200	\$ 343,300	\$ 275,000				\$ 880,200
Vehicles									\$ -	
Sub-total Facilities Operations	\$ 335,000	\$ 717,300	\$ 493,000	\$ 784,600	\$ 763,000	\$ 50,000	\$ -	\$ -	\$ 3,142,900	
PP&G	Production Print & Graphics						\$ 90,000			\$ 90,000
	Sub-total PP&G	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 90,000	\$ -	\$ -	\$ 90,000
Student Services & Special Pops	ACE								\$ 20,000	\$ 20,000
	Program Refresh (Instructional Equipment)		\$ 63,000	\$ 63,000	\$ 63,000	\$ 63,000				\$ 252,000
	Repair/Replacement		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	STEMi				\$ 200,000					\$ 200,000
	NAIS Build (SE)									\$ -
	NAIS Equipment									\$ -
	Robotics (Location TBD)									\$ -
	Special Ed Assistive Tech + Other Cap Needs								\$ 300,000	\$ 300,000
VLAC K-8/ 9-12								\$ 80,000	\$ 80,000	
Sub-total Student Services	\$ -	\$ 88,000	\$ 88,000	\$ 288,000	\$ 88,000	\$ -	\$ -	\$ 400,000	\$ 952,000	
Technology Services	Audio Video Equipment Upgrades	\$ 100,000								\$ 100,000
	Battery Replacements (UPS for Data Center)	\$ 19,600	\$ 2,100	\$ 1,800	\$ 2,100	\$ 2,100	\$ 300	\$ 2,000		\$ 30,000
	Cabling Services	\$ 1,000	\$ 500	\$ 500	\$ 500	\$ 500		\$ 1,000		\$ 4,000
	CFEF Desktops/Laptops/Labs		\$ 100,000	\$ 100,000	\$ 100,000	\$ 100,000				\$ 400,000
	CFEF Mobile Devices		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	CFEF Network Electronics									\$ -
	Communications Channel	\$ -								\$ -
	Copier/Printer Replacements									\$ -
	Emerging Technologies (equip test/demo)	\$ 100,000								\$ 100,000
	ONE Network Electronics									\$ -
	OS Backup									\$ -
	OS Desktops/Laptops/Labs/Mobile Devices	\$ 200,000								\$ 200,000
	OS Network Electronics									\$ -
	OS SAN									\$ -
	OS Security (Firewalls/Filtering)	\$ 130,000	\$ 14,000	\$ 12,000	\$ 14,000	\$ 14,000	\$ 2,000	\$ 14,000		\$ 200,000
OS Servers Incl Virtual/OS Voice Upgrade	\$ 130,000	\$ 14,000	\$ 12,000	\$ 14,000	\$ 14,000	\$ 2,000	\$ 14,000		\$ 200,000	
OS Telecomm/Enterprise Software Licensing									\$ -	
Sub-total T.S.	\$ 680,600	\$ 155,600	\$ 151,300	\$ 155,600	\$ 155,600	\$ 4,300	\$ 31,000	\$ -	\$ 1,334,000	
<b>GRAND TOTAL</b>		<b>\$ 1,015,600</b>	<b>\$ 960,900</b>	<b>\$ 732,300</b>	<b>\$ 1,228,200</b>	<b>\$ 1,006,600</b>	<b>\$ 144,300</b>	<b>\$ 31,000</b>	<b>\$ 400,000</b>	<b>\$ 5,518,900</b>

Oakland Schools 5 Year Capital Plan

Oakland Schools Capital Outlay 5-Year Plan School Fiscal Years 2027-31		2031								
		Main	NE	NW	SE	SW			Instr/Curr	2031
		Campus	Campus	Campus	Campus	Campus	PP&G	Summit	Programs	TOTAL
Facilities Projects	HVAC Upgrades									\$ -
	Chiller									\$ -
	Lighting & Energy Efficiency Upgrades									\$ -
	Painting									\$ -
	Parking Lot Repaving									\$ -
	Phase I Sec. Ent. (Security, Card Access, Fire)									\$ -
	Phase II (Painting, Floors, Aesthetics)									\$ -
	Roof Replacement									\$ -
	Safety/Security									\$ -
	SE RTUs									\$ -
Summit Reconfig									\$ -	
Facilities Operations Routine Maintenance	A&E Consulting Fees		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	Asphalt Repairs	\$ 10,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 30,000
	Building Updates	\$ 1,000,000	\$ 30,000	\$ 30,000	\$ 30,000	\$ 30,000				\$ 1,120,000
	Concrete Repairs/Replacement/Leveling	\$ 10,000	\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 30,000
	Custodial/Maintenance Equipment		\$ 22,000	\$ 22,000	\$ 22,000	\$ 22,000				\$ 88,000
	Electrical Updates	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000				\$ 50,000
	Exterior - Brick Tuck-Pointing	\$ 5,000								\$ 5,000
	Flooring Updates	\$ 50,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 15,000	\$ 25,000			\$ 135,000
	Furniture/Equipment	\$ 20,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 40,000	\$ 5,000			\$ 185,000
	Grounds									\$ -
	HVAC Maintenance	\$ 150,000	\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 250,000
	Lighting & Energy Maintenance	\$ 100,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 20,000			\$ 160,000
	Plumbing	\$ 5,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000				\$ 85,000
	Program Refresh		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	Roof Repair		\$ 5,000	\$ 5,000	\$ 5,000	\$ 5,000				\$ 20,000
	Safety/Security	\$ 15,000	\$ 10,000	\$ 10,000	\$ 10,000	\$ 10,000				\$ 55,000
Vehicles									\$ -	
	Sub-total Facilities Operations	\$ 1,375,000	\$ 247,000	\$ 247,000	\$ 247,000	\$ 247,000	\$ 50,000	\$ -	\$ -	\$ 2,413,000
PP&G	Production Print & Graphics						\$ 90,000			\$ 90,000
	Sub-total PP&G	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 90,000	\$ -	\$ -	\$ 90,000
Student Services & Special Pops	ACE							\$ 20,000		\$ 20,000
	Program Refresh (Instructional Equipment)		\$ 63,000	\$ 63,000	\$ 63,000	\$ 63,000				\$ 252,000
	Repair/Replacement		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	STEMi				\$ 200,000					\$ 200,000
	NAIS Build (SE)									\$ -
	NAIS Equipment									\$ -
	Robotics (Location TBD)									\$ -
	Special Ed Assistive Tech + Other Cap Needs							\$ 300,000		\$ 300,000
VLAC K-8/ 9-12							\$ 80,000		\$ 80,000	
	Sub-total Student Services	\$ -	\$ 88,000	\$ 88,000	\$ 288,000	\$ 88,000	\$ -	\$ -	\$ 400,000	\$ 952,000
Technology Services	Audio Video Equipment Upgrades	\$ 100,000								\$ 100,000
	Battery Replacements (UPS for Data Center)	\$ 120,000	\$ 20,000	\$ 20,000	\$ 20,000	\$ 20,000		\$ 3,000		\$ 203,000
	Cabling Services	\$ 1,000	\$ 500	\$ 500	\$ 500	\$ 500		\$ 1,000		\$ 4,000
	CFEF Desktops/Laptops/Labs		\$ 156,100	\$ 154,100	\$ 150,100	\$ 151,100				\$ 611,400
	CFEF Mobile Devices		\$ 25,000	\$ 25,000	\$ 25,000	\$ 25,000				\$ 100,000
	CFEF Network Electronics									\$ -
	Communications Channel	\$ -								\$ -
	Copier/Printer Replacements	\$ 135,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 60,000	\$ 2,000	\$ 30,000		\$ 407,000
	Emerging Technologies (equip test/demo)	\$ 100,000								\$ 100,000
	ONE Network Electronics									\$ -
	OS Backup									\$ -
	OS Desktops/Laptops/Labs/Mobile Devices	\$ 392,000					\$ 8,000			\$ 400,000
	OS Network Electronics									\$ -
	OS SAN									\$ -
	OS Security (Firewalls/Filtering)									\$ -
OS Servers Incl Virtual/OS Voice Upgrade									\$ -	
OS Telecomm/Enterprise Software Licensing									\$ -	
	Sub-total T.S.	\$ 848,000	\$ 261,600	\$ 259,600	\$ 255,600	\$ 256,600	\$ 10,000	\$ 34,000	\$ -	\$ 1,925,400
<b>GRAND TOTAL</b>		<b>\$ 2,223,000</b>	<b>\$ 596,600</b>	<b>\$ 594,600</b>	<b>\$ 790,600</b>	<b>\$ 591,600</b>	<b>\$ 150,000</b>	<b>\$ 34,000</b>	<b>\$ 400,000</b>	<b>\$ 5,380,400</b>



March 25, 2026

Dear Board of Education Designate:

The Oakland Schools Board of Education and I invite you to review the enclosed proposed Oakland Schools budget for FY 2026-27. Per the Michigan School Code, Section 380.624(2), the proposed FY 2026-27 **General Fund budget** is to be submitted to its constituent district Boards of Education for review. For transparency purposes, Oakland Schools has included the budgets for all of our funds in the enclosed document; however, it is only the **General Fund budget** upon which constituent districts vote. More details regarding the timing of the Designates meeting and your board resolution appear near the end of this transmittal letter.

As you know, Oakland Schools is primarily funded by property tax dollars, and we are projecting a growth factor in Oakland Schools' property tax revenues of 3.4%. Tax revenue projections are conservative compared to Oakland County taxable value increase projections as actual taxable value figures are not available during the preparation of this budget.

Please refer to the Enterprise-Wide Executive Summary for a discussion of key projects and initiatives contained in the 2026-27 budget, including but not limited to:

- Artificial Intelligence (AI) Strategy and Capacity Building
- Special Populations Continuum of Supports
- Social-Emotional Wellbeing and Mental Health Support
- Nanotechnology, Artificial Intelligence and Synthetic Biology (NAIS) Lab
- Oakland Schools Technical Campus Renovations
- Business Office Residency Program
- Human Resources Leadership Academy (HRLA)
- Essential Practices in Instruction ⇌ Capacity & Coherence (EPIC) Numeracy Project
- Literacy Essentials Oakland (LEO)

### **Subsidies**

Oakland Schools provides over \$1.4 million in subsidies for software and other instructional tools in the areas of Career and Technical Education and curriculum and assessment. The subsidies provided in the 2026-27 budget are detailed within this document and are exclusive of pass-through grant funds, other district allocations and the cost of dedicated staff who support student and HR/Finance software and applications.

### **Personnel Costs**

Step increases for those employees who are eligible are included in the 2026-27 budget along with a 2.0% salary increase for all staff. All union salary changes, including step adjustments, are subject to collective bargaining.

### **PA-18 Special Education Funding**

Oakland Schools receives property tax revenue for support of Special Education programs. The base distribution of PA-18 funding to local school districts is budgeted to increase approximately \$5.2 million or 2.9%. Additionally, \$2.5 million is budgeted for other LEA distributions for group home expenditures,

reimbursements to districts for educating incarcerated youth, special education program startup and extraordinary expenditures and capital. The budget also contains \$5.0 million for the construction of an Autism Spectrum Disorder (ASD) Center Program in Oxford. In FY 2025-26, Oakland Schools distributed additional PA-18 funds totaling \$5.8 million above the base distribution.

### **Planning for the Future**

Oakland Schools is dedicated to sound financial planning and preparing for economic uncertainties in the future. In that regard, we utilize a five-year forecast that is updated with each budget amendment and incorporates projections from Oakland County Equalization for taxable values. We also maintain a five-year capital plan that is updated annually to prepare for necessary improvements and upgrades to facilities and equipment.

Please be assured that we will continue to work hard to ensure that the budget reflects our continued commitment to increasing student achievement, using economies of scale to decrease operating costs for local districts, customizing and regionalizing programs and services to meet the diverse needs of our constituent school districts, and assisting schools and districts in meeting state and federal mandates.

Per the Michigan School Code, Section 380.624(2), the proposed FY 2026-27 **General Fund budget** is to be submitted to its constituent districts' Boards of Education for review by May 1. Not later than June 1, the board of each constituent district shall adopt a resolution of support or non-support of the **General Fund budget**. A presentation of the budget to our 28 local school district business managers is scheduled to occur at their meeting of the Oakland County School Business Officials on April 17, 2026. The Oakland Schools Board of Education will then hold a Designates Meeting on April 29 at 6:00 PM, providing local board designates and district administration an opportunity to review the General Fund budget prior to submitting their board's resolution to Oakland Schools on or before June 1, 2026. Please note that while Oakland Schools provides all our fund budgets to our constituent districts for review, LEA Designates are only voting on the General Fund budget.

The Oakland Schools Board of Education will hold a Truth in Budgeting hearing on June 1 and will consider the FY 2026-27 proposed budget documents for approval during its regular meeting that night. Should you have any questions regarding the budget, please contact my office at 248.209.2424. All questions will receive prompt replies.

Sincerely,



Kenneth Gutman  
Superintendent  
Oakland Schools

cc: District Superintendent  
District Business Manager

9.3.2. Chartwells Renewal 26/27

9.3.3. Lease Agreements

9.3.3.1. Royal Oak Youth Assistance 2026-27

9.3.3.2. City of Royal Oak Arts, Beats & Eats Parking 2026

9.3.3.3. City of Royal Oak Grant Park 2026-27

9.3.3.4. City of Royal Oak Center Street Garage 2026-27

9.3.3.5. YMCA After-School Program

9.3.4. Oak Ridge Contract Award

335



**ROYAL OAK SCHOOLS**  
A COMMUNITY OF EXCELLENCE

**MEMORANDUM**

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TO: Dr. John Tafelski

FROM: Michelle Kerns, AIA

DATE: May 11, 2026

RE: Bid #26-14 Oak Ridge Elementary School Remodeling

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Bid #26-14 Oak Ridge Elementary School Chiller Remodeling is a creating 2 additional learning environments in Learning Commons and Kindergarten wing. The construction documents were TMP Architecture.

Request for Proposal (RFP) developed and released: April 15, 2026  
Pre-Bid Meeting: April 20, 2026  
Bids Due: April 29, 2026  
Post Bid Interview/reference checks: May 5, 2026

Three vendors submitted proposals. Proposals were reviewed by Mark Paulus and TMP Architecture. Post-bid meeting was held, and references were checked.

Based on the bids and post-bid interviews, we are recommending the low-responsive bidder, A.F. Belisario, Inc., be awarded a contract in the amount of \$122,520.00. Additionally, we are requesting a 10% contingency to address any unforeseen conditions.

Attachments:

Bid tabulation  
Board Resolution







Ground Maintenance, CE, Utility  
Tractors, Mowers, RTV's - 112624-KBA  
Ag Tractors with Related Attachments - 082923-KBA  
NJPA Arkansas 460005337  
Nebraska 14777 (DC)  
Mississippi 8200067336

RTVX2C-SKLH-1 WEB QUOTE #2963874

Date: 4/30/2026 7:12:49 AM

- Customer Information -

Peace, Ken

84711

Royal oak schools

ken.peace@royaloackschools.org  
2484358400

Quote Provided By  
WEINGARTZ SUPPLY CO.  
Steve Strnad  
46061 VAN DYKE AVE.  
UTICA, MI 48317  
email: sstrnad@weingartz.com  
phone: 5862550758

- Standard Features -

- Custom Options -



V Series

RTVX2C-SKLH-1

\*\*\* EQUIPMENT IN STANDARD MACHINE \*\*\*

**DIESEL ENGINE**

Model Kubota D1105  
3 Cyl. 68.5 cu in  
+23.3 Gross Eng HP  
75 Amp Alternator

**TRANSMISSION**

VHT-X  
Variable Hydro Transmission  
Forward Speeds:  
Low 0 - 15 mph  
High 0 - 25 mph  
Reverse 0 - 17 mph  
Limited-slip Front Differential  
Rear differential lock

**HYDRAULICS**

Hydrostatic Power Steering  
with manual tilt-feature  
Hydraulic Cargo Dump  
Hydraulic Oil Cooler

**FLUID CAPACITY**

Fuel Tank 7.9 gal  
Cooling 8.3 qts  
Engine Oil 4.3 qts  
Transmission Oil 1.8 gal  
Brake Fluid 0.4 qts

**CARGO BOX**

Width 57.7 in  
Length 40.5 in  
Depth 11.2 in  
Load Capacity 1102 lbs  
Vol. Capacity 15.2 cu ft

+ Manufacturer Estimate

**TIRES AND WHEELS**

ATV Tire 25 x 10 - 12, 6 ply  
HDMP Tires 25 x 10 - 12, 6 ply

**KEY FEATURES**

Factory Cab with A/C, Heater,  
Defroster  
Digital Multi-meter  
Fully-opening roll-down side  
windows  
Speedometer  
Pre-wired w/ speakers/antenna for  
stereo  
Front Independent Adjustable  
Suspension  
Rear Independent Adjustable  
Suspension  
Brakes - Front/Rear Wet Disc  
Rear Brake Lights / Front  
Headlights  
2" Hitch Receiver, Front and Rear  
Deluxe 60/40 split bench seats  
with driver's side seat adjustment  
Underseat Storage Compartments  
Deluxe Front Guard  
(radiator guard, bumper, and lens  
guard)

**DIMENSIONS**

Width 63.2 in  
Height 81.9 in  
Length 120.3 in  
Wheelbase 80.5 in  
Tow Capacity 1300 lbs  
Ground Clearance 10.4 in  
Suspension Travel 8 in  
Turning Radius 13.1 ft

**SAFETY EQUIPMENT**

SAE J2194 & OSHA 1928 ROPS  
Horn  
Dash-mounted Parking Brake  
Spark Arrestor Muffler  
Retractable 2-point Seat Belts

RTVX2C-SKLH-1 Base Price: \$31,399.00

Selected Kubota Attachments

(1) LED FRONT WORK LIGHTS KIT (2) 77700-11811-LED FRONT WORK LIGHTS KIT (2)	\$204.99
(1) LED REAR WORK LIGHT KIT (1) 77700-11812-LED REAR WORK LIGHT KIT (1)	\$109.99
(1) STROBE LIGHT MOUNT KIT 77700-VC5058-STROBE LIGHT MOUNT KIT	\$187.95
(1) TRAILER HITCH - BALL MOUNT 77700-V5200-TRAILER HITCH - BALL MOUNT	\$69.53
(1) REAR SCREEN - BLACK K7731-99280-REAR SCREEN - BLACK	\$393.05
(1) SINGLE SIDE MIRROR - CAB (1) 77700-V5059-SINGLE SIDE MIRROR - CAB (1)	\$118.82

Total Kubota Attachments: \$1,084.33

Total Attachments: \$1,084.33

**Configured Price: \$32,483.33**

Sourcewell Discounts:

Kubota Items: (\$7,146.33)

Total Discount: (\$7,146.33)

**SUBTOTAL: \$25,337.00**

Kubota Item Fees:

Dealer Assembly: \$265.83

Freight Cost: \$881.25

PDI: \$400.00

Total Unit Price: \$26,884.08

Quantity Ordered: 1

**Final Sales Price: \$26,884.08**

**Purchase Order Must Reflect Final Sales Price.**

To order, place your Purchase Order directly with the quoting dealer

\*All equipment specifications are as complete as possible as of the date on the quote. Additional attachments, options, or accessories may be added (or deleted) at the discounted price. All specifications and prices are subject to change. Taxes are not included. The PDI fees and freight for attachments and accessories quoted may have additional charges added by the delivering dealer. These charges will be billed separately. Prices for product quoted are good for 60 days from the date shown on the quote. All equipment as quoted is subject to availability.

© 2018 Kubota Tractor Corporation. All rights reserved.

Approved By:

Quoted:

Date:

Quoted By: Weingartz, Steve Strnad, 46061 Van Dyke Ave, Utica, MI 48317

Phone: 586-255-0758

WWW.WEINGARTZ.COM

## QUOTATION

To: **ROYAL OAK PUBLIC SCHOOLS**  
 800 DEVILLEN  
 ROYAL OAK, MI 48067

Quote #: **11075306-00**  
 Date: **02/26/26**  
 Exp Date:

Attn:  
 Phone: (248) 435-8400  
 Email:

Prepared By: **Steve Strnad**  
 Phone: (586) 262-5878  
 Email: [sstrnad@weingartz.com](mailto:sstrnad@weingartz.com)

Product number	Product and Description	Qty	Sale Price	Total
bomsc12480	6'6" Utv V Plow Blade Crate List Price: \$4,597.50	1	\$4,597.50	\$4,597.50
bomsc12060	Boss Plow Box 6'6" Utv V List Price: \$3,677.10	1	\$0.00	\$0.00
bolta12549	UC/UTV Kubota RTV '14+ &NEWER List Price: \$370.80	1	\$0.00	\$0.00
bomsc09601	Handheld Controller V-Blade List Price: \$381.10	1	\$0.00	\$0.00
bomsc13171	Power/Ground Ext Kit 90" 4-Gauge List Price: \$144.20	1	\$133.09	\$133.09
BOMSC25007	Wiring Kit, UTV-Full Size List Price: \$278.10	1	\$0.00	\$0.00
bovbs19300b	Boss UTV VBX3000 V-Box Spreader List Price: \$6,293.30	1	\$5,227.50	\$5,227.50
bovbs11060	Control Kit - VBX3000 000 List Price: \$885.80	1	\$0.00	\$0.00
bomsc13099	Snow Deflector - 6'6 UTV V XT List Price: \$267.80	1	\$235.99	\$235.99

Total \$10,194.08  
 Invoice Total \$10,194.08

Approved By

Customer

Date

Weingartz Representative

Date





800.968.0010 | YEOANDYEO.COM

March 25, 2026

Kathy Abela, Finance Director  
Royal Oak Schools  
800 DeVillen  
Royal Oak, MI 48073

We appreciate the opportunity and thank you for considering an extension to our auditing engagement. We have enjoyed working with you and your staff and feel we have been able to provide a consistent quality audit team. We have a deep understanding of how the district operates, which helps us identify key areas during our audit to offer opportunities to strengthen controls, and make suggestions to increase operating efficiencies.

We do understand that cost is an important factor, and we feel we can offer the following for your consideration:

June 30,	Audit & Single Audit
2026	\$49,500
2027	\$51,625
2028	\$54,200

June 30,	Audit & Single Audit
2026	\$48,925
2027	\$50,400
2028	\$52,155
2029	\$54,250
2030	\$56,425

Again, thank you for this opportunity and should you have any questions, feel free to contact me at your convenience.

Sincerely,

Jamie L. Rivette, CPA, CGFM  
Principal

Please select one:  Three-year engagement

Acceptance:

Five-year engagement

\_\_\_\_\_  
Signature & Title

9.4. Staff and Student Services

**Presenter:** Patrick Wolynski

9.4.1. Personnel Changes

343

May 14, 2026

**Regular Personnel Changes:**

RESOLVED that Royal Oak Schools Board of Education hereby approves the following regular personnel changes:

<b>NAME</b>	<b>POSITION</b>	<b>ACTION</b>	<b>EFFECTIVE DATE</b>
Marcie Dryden	Principal – Keller Elementary LOS: 29 yrs	Retirement	6/30/2026
Elizabeth Hahn	ASD Teacher – Elementary Level	Hired	8/24/2026

10. PUBLIC COMMENT FOR ITEMS NOT ON THE AGENDA

11. BOARD COMMENTS / LIAISON REPORT

12. ADJOURNMENT (approval by consensus)

[Royal Oak Schools Board of Education meetings are open to the public. There is a time for public participation during the meeting as indicated in the agenda. This meeting is for the purposes of conducting the School District's business and is not to be considered a "community" meeting.]