

**The Lockhart Independent School District  
Board of Trustees**

**M.L. Cisneros Education Support Center Boardroom, 2nd Floor, Room 200, 419 Bois D'Arc Street,  
Lockhart, TX 78644  
Regular Meeting, May 15, 2023 – 6:30 PM**

Notice is hereby given that on May 15, 2023, the Board of Trustees of the Lockhart Independent School District will hold a Regular meeting at 6:30 PM in the M.L. Cisneros Education Support Center Boardroom, 2nd Floor, Room 200, 419 Bois D'Arc Street, Lockhart, TX 78644. The subjects to be discussed or considered or upon which any formal action may be taken are listed below. Items do not have to be taken in the same order as shown on this meeting notice. Unless removed from the consent agenda, items identified within the consent agenda will be acted on at one time.

1. Call to Order
2. Presentation of Colors by JROTC
3. Invocation
4. Recognitions
  - A. Elementary & Junior High Million Word Readers
5. Public Comment
6. CLOSED SESSION:
  - A. Adjourned to Closed Session: Pursuant to Texas Government Code Section 551.072, (Deliberation Regarding Real Property), Texas Government Code Section 551.074, (Personnel, to deliberate regarding the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee; Texas Government Code Section 551.076 (Deliberation regarding implementation of security personnel or devices) specifically to discuss:
    1. Superintendent's Monthly Performance Review
7. Business: Consent Agenda
  - A. Approval of Minutes:
    1. April 24, 2023 3
    2. May 8, 2023 7
  - B. Approve 2023-2024 Board of Trustees Regular Meeting Schedule 8
  - C. Approve Amendment to Transportation Management Services contract with Goldstar Transit 11
  - D. Approve Change in Board Policy CV (Local):Facilities Construction 13
  - E. Approve Policy Update 120: BBB(LOCAL): BOARD MEMBERS - ELECTIONS; CKC(LOCAL): SAFETY PROGRAM/RISK MANAGEMENT - EMERGENCY PLANS; CRD(LOCAL): INSURANCE AND ANNUITIES MANAGEMENT - HEALTH AND LIFE INSURANCE; FNG(LOCAL): STUDENT RIGHTS AND RESPONSIBILITIES - STUDENT AND PARENT COMPLAINTS/GRIEVANCES; FO(LOCAL): STUDENT DISCIPLINE 16
  - F. Approve Budget Amendments 32
  - G. Approve Personnel Recognition Financial Support Plan For School Nutrition Staff 35
  - H. Review Cash Investment Report 37
  - I. Review Tax Collection Report 40
8. COMMUNICATION:
  - A. Progress Monitoring Data on District Achievement Targets 43
  - B. Review 2023-2024 ESC-13 Commitment Forms 45
  - C. Review 2023 Tax Rate to be Published 51
  - D. Review Date for Public Meeting on 2023-2024 Budget 56
  - E. Bank Depository Contract Renewal 58

9. COMMUNICATION/ACTION:

- A. Consider and/or Approve Southeast Service Corporation d/b/a SSC Service Solutions for a one year contract 60
- B. Consider and/or Approve Request for Proposal (RFP) 23-003 for a Construction Manager at Risk(CMAR) for Elementary 6
- C. Consider and/or Approve Request for Proposal (RFP) 23-003 for a Construction Manager at Risk(CMAR) for High School

10. BOARD AND STAFF COMMENTS-ITEMS OF COMMUNITY INTEREST\*

11. BENEDICTION

12. ADJOURNMENT

\*BOARD AND STAFF COMMENTS - ITEMS OF COMMUNITY INTEREST: Items of community interest are limited to: 1) expressions of thanks, congratulations or condolence; 2) information regarding holiday schedules; 3) an honorary or salutory recognition of a public official, public employee, or other citizen, except that a discussion regarding a change in the status of a person's public office or public employment is not an honorary or salutory recognition for purposes of this subdivision; 4) a reminder about an upcoming event organized or sponsored by the governing body; 5) information regarding a social, ceremonial, or community event organized or sponsored by an entity other than the governing body that was attended or is scheduled to be attended by a member of the governing body or an official employee of the school district.

If, during the course of the meeting, discussion of any item on the agenda should be held in a closed meeting, the board will conduct a closed meeting in accordance with the Texas Open Meetings Act, Government Code, Chapter 551, Subchapters D and E or Texas Government Code section 418.183(f). Before any closed meeting is convened, the presiding officer will publicly identify the section or sections of the Act authorizing the closed meeting. All final votes, actions, or decisions will be taken in open meeting. [See BEC(LEGAL)]


Texas Government Code Section:

- 551.071 Consultation with Attorney; Closed Meeting
- 551.072 Deliberation Regarding Real Property; Closed Meeting
- 551.073 Deliberation Regarding Prospective Gift; Closed Meeting
- 551.074 Personnel Matters; Deliberate the Appointment, Employment, Evaluation, Reassignment, Duties, Discipline or Dismissal of a Public Officer or Employee; Closed Meeting
- 551.075 Conference Relating to Investments and Potential Investments Attended by Board of Trustees of Texas Growth Fund; Closed Meeting
- 551.076 Deliberation Regarding Security Devices; Closed Meeting
- 551.082 School Children; School District Employees; Disciplinary Matter or Complaint
- 551.083 Certain School Boards; Closed Meeting Regarding Consultation with Representative of Employee Group
- 551.084 Investigation; Exclusion of Witness from Hearing

Should any final action, final decision, or final vote be required in the opinion of the School Board with regard to any matter considered in such closed or executive meeting or session, then the final decision, or final vote shall be either:

- (a) in the open meeting covered by the Notice upon the reconvening of the public meeting; or,
- (b) at a subsequent public meeting of the School Board upon notice thereof; as the School Board shall determine.

On this day of May 12, 2023, this Notice was mailed or faxed to news media who had previously requested such Notice and an original copy was posted on the display window in the School District Administration Building on said date.



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Superintendent

# Minutes of Regular Meeting

## The Board of Trustees

### Lockhart Independent School District

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A Regular meeting of the Board of Trustees of Lockhart Independent School District was held Monday, April 24, 2023, beginning at 6:30 PM in the M.L. Cisneros Education Support Center Boardroom, 2nd Floor, Room 200, 419 Bois D'Arc Street, Lockhart, TX 78644.

1. Call to Order was at 6:30 P.M. by Board President Michael Wright. Other members present were Rebecca Pulliam, Dr. Barbara Sanchez, Warren Burnett, Sam Lockhart, and Rene Rayos. Tom Guyton arrived at 6:33 P.M.
2. Presentation of Colors by JROTC
3. Invocation was given by Trustee Burnett
4. Recognitions
  - A. Visual Arts Scholastic Event
  - B. Technology Student Association (TSA) State Winners
  - C. Basketball and Soccer THSCA Academic All-State Recipients
  - D. Lockhart Junior High School Color Guard
  - E. Lockhart High School Color Guard
5. Public Comment

None.

6. COMMUNICATION:
  - A. Discussion of Districtwide Intruder Detection Audit Report Findings

This presentation was given by Karl Addock, Parent and Lion Guard Leader.

The Board moved to item 9-A.

9. COMMUNICATION
  - A. 130 Environmental Park Partnership

This presentation was given by the Alfonso Sifuentes, Director of Public Sector Services & Community Relations. No action was taken.

7. CLOSED SESSION:
  - A. Adjourned to Closed Session: Texas Government Code Section 551.072 (Deliberation Regarding Real Property); Texas Government Code Section 551.074 (Personnel, to

deliberate regarding the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee); Texas Government Code Section 551.076 (Deliberation regarding implementation of security personnel or devices) specifically to discuss:

1. Intruder Detection Audit

**The Board of Trustees on Monday, April 24, 2023 convened at 7:17 PM in closed session in accordance with the Texas Open Meetings Act for the purposes of discussing items listed under the Texas Government Code Section 551.072 (Deliberation Regarding Real Property); Texas Government Code Section 551.074 (Personnel to deliberate regarding the appointment, employment, evaluation, reassignment, duties, discipline, or dismissal of a public officer or employee) and Texas Government Code Section 551.076 (Deliberation regarding implementation of security personnel or devices). The Board ended its closed session at 7:56 PM on Monday, April 24, 2023. No votes, decisions, or actions were taken while in closed session.**

8. BUSINESS: CONSENT AGENDA

A. Approve Minutes:

1. March 27, 2023
2. April 10, 2023

B. Approve 2023-2024 Instructional Materials Allotment and TEKS Certification Form

C. Approve Expenditure for Lockhart High School Project Graduation

D. Approve Budget Amendments

E. Approve DEC(LOCAL): COMPENSATION AND BENEFITS-LEAVES AND ABSENCES

F. Approve Vendor Purchase for Food Service in Excess of \$100,000 for the 2022-2023 School Year

G. Review 2023-2024 Board of Trustees Regular Meeting Schedule

H. Review Tax Collection Report

I. Review Quarterly Investments Report

**Trustee Sanchez made the motion to approve the business consent agenda as presented.**

**Trustee Pulliam seconded the motion. The motion carried, 7-0.**

9. COMMUNICATION

B. Holdsworth Center District Update

This presentation was given by the Scott Lipton, Holdsworth District Consultant. No action was taken.

C. Progress Monitoring Data on District Achievement Targets

This presentation was given by the Assistant Superintendent of Curriculum & Instruction,

Ty Davidson. No action was taken.

D. Southeast Service Corporation d/b/a SSC Service Solutions Presentation

This presentation was given by the Executive Director of Operations, James Acuna. No action was taken.

E. Amend Transportation Management Services contract with Goldstar Transit

This presentation was given by the Executive Director of Operations, James Acuna. No action was taken.

F. Communicate the release of a Request for Qualification (RFQ) for Energy Conservation Services

This update was given by the CFO, Nicole Weiser. No action was taken.

G. Communicate the release of a Request for Proposals (RFP) for Copiers

This update was given by the CFO, Nicole Weiser. No action was taken.

H. Review Change in Board Policy CV (Local):Facilities Construction

This update was given by the Bond Construction Manager, Jeremiah Chapman. No action was taken.

I. District Improvement Plan and Campus Improvement Plans Formative Review for April 2023

This presentation was given by the Deputy Superintendent, Dr. Stephaine Camarillo. No action was taken.

J. Policy Update 120: BBB(LOCAL): BOARD MEMBERS - ELECTIONS; CKC(LOCAL): SAFETY PROGRAM/RISK MANAGEMENT - EMERGENCY PLANS; CRD(LOCAL): INSURANCE AND ANNUITIES MANAGEMENT - HEALTH AND LIFE INSURANCE; FNG(LOCAL): STUDENT RIGHTS AND RESPONSIBILITIES - STUDENT AND PARENT COMPLAINTS/GRIEVANCES; FO(LOCAL): STUDENT DISCIPLINE

This presentation was given by the Deputy Superintendent, Dr. Stephaine Camarillo. No action was taken.

K. Communication of new Administrative Policy for Audio Enhancements Audio Safety Systems District Wide

This presentation was given by the Director of Technology, Cassie Salinas. No action was taken.

10.COMMUNICATION/ACTION

- A. Consider and/or Approve Staffing for the 2023-2024 School Year

**Trustee Guyton made the motion that the Board approve the position as presented for the 2023-2024 fiscal year. Trustee Rayos seconded the motion. The motion carried, 7-0.**

- B. Consider and/or Approve Tarleton State University - Memorandum of Understanding Distinguished High School Partnership Tarleton Today Program

**Trustee Sanchez made the motion that the Board approve the Tarleton State University - Memorandum of Understanding Distinguished High School Partnership Tarleton Today Program as presented. Trustee Pulliam seconded the motion. The motion carried, 7-0.**

- C. Consider and/or Approve Lamar Institute of Technology (LIT) - Memorandum of Understanding

**Trustee Sanchez made the motion that the Board approve the Lamar Institute of Technology (LIT) - Memorandum of Understanding as presented. Trustee Rayos seconded the motion. The motion carried, 7-0.**

11. BOARD AND STAFF COMMENTS-ITEMS OF COMMUNITY INTEREST\*

12. BENEDICTION was given by Trustee Guyton

13. ADJOURNMENT was at 9:14 p.m. by Board President Michael Wright

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Michael Wright, Board President

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Tom Guyton, Board Secretary

# Minutes of Special Meeting

## The Board of Trustees Lockhart Independent School District

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A Special meeting of the Board of Trustees of Lockhart Independent School District was held Monday, May 8, 2023, beginning at 6:30 PM in the M.L. Cisneros Education Support Center Boardroom, 2nd Floor, Room 200, 419 Bois D'Arc Street, Lockhart, TX 78644.

1. Call to Order was at 6:30 p.m. by Board President Michael Wright. Other members present were Dr. Barabara Sanchez, Rene Rayos, Rebecca Pulliam, Warren Burnett, Sam Lockhart, and Tom Guyton.
2. Public Comment

None.

### 3. COMMUNICATION:

#### A. 2023-2024 Staffing and Budget Session

This presentation was given by Nicole Weiser, Chief Financial Officer. No action was taken.

### 4. COMMUNICATION/ACTION:

#### A. Consider and/or Approve Staffing for the 2023-2024 School Year

**Trustee Guyton made the motion that the Board approve the positions and stipend as presented for the 2023-2024 fiscal year. Trustee Rayos seconded the motion. The motion carried, 7-0.**

5. ADJOURNMENT was at 7:56 p.m. by Board President Michael Wright

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Michael Wright, Board President

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Tom Guyton, Board Secretary

# Lockhart Independent School District Board of Trustees

Date of Board Meeting:

Agenda Item:

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AGENDA SECTION:

READING:

PREVIOUS BOARD REVIEW DATE:

TYPE OF ACTION:

DEPARTMENT:

## DISTRICT GOAL(S) ALIGNMENT:

1. Create innovative opportunities for ALL students to prepare for success beyond graduation.
2. Every campus will have an A rating by 2028 through exemplary teaching and student-centered learning.
3. Cultivate an environment where our employees choose Lockhart Independent School District.

AGENDA TITLE:

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BACKGROUND INFORMATION:

ATTACHMENT(S):

RECOMMENDATION:

RECOMMENDED MOTION:



# LOCKHART INDEPENDENT SCHOOL DISTRICT

419 Bois D'Arc Street • Lockhart, Texas 78644 • phone: 512.398.0000 • fax: 512.398.0031  
www.lockhart.isd.org

**2023–2024**

## Board of Trustees Regular School Board Meetings

Location: M.L. Cisneros Education Support Center, 419 Bois D' Arc

Regular Board meetings begin at 6:30 p.m.

- Monday, August 28, 2023
- Monday, September 25, 2023
- Monday, October 23, 2023
- Monday, November 13, 2023 (2nd Monday)
- Monday, December 11, 2023 (2<sup>nd</sup> Monday)
- Tuesday, January 16, 2024
- Monday, February 26, 2024
- Monday, March, 25, 2024
- Monday, April, 22, 2024
- Monday, May 13, 2024 (2<sup>nd</sup> Monday)
- Monday, June 3, 2023 (Special Called Board Meeting)
  - Monday, June 24, 2024
  - Monday, July 22, 2024

\*Unless otherwise noted, regular meetings occur on the 4th Monday of the month.\*

# Lockhart Independent School District Board of Trustees

Date of Board Meeting:

Agenda Item:

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AGENDA SECTION:

READING:

PREVIOUS BOARD REVIEW DATE:

TYPE OF ACTION:

DEPARTMENT:

## DISTRICT GOAL(S) ALIGNMENT:

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3. Cultivate an environment where our employees choose Lockhart Independent School District.

AGENDA TITLE:

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BACKGROUND INFORMATION:

ATTACHMENT(S):

RECOMMENDATION:

RECOMMENDED MOTION:

# Lockhart Independent School District Board of Trustees

Date of Board Meeting:

Agenda Item:

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AGENDA SECTION:

READING:

PREVIOUS BOARD REVIEW DATE:

TYPE OF ACTION:

DEPARTMENT:

## DISTRICT GOAL(S) ALIGNMENT:

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AGENDA TITLE:

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BACKGROUND INFORMATION:

ATTACHMENT(S):

RECOMMENDATION:

RECOMMENDED MOTION:

FACILITIES CONSTRUCTION

CV  
(LOCAL)

**Compliance with Law**

The Superintendent shall establish procedures that ensure that all school facilities within the District comply with applicable laws and local building codes.

**Construction Contracts**

Prior to advertising, the Board shall determine the project delivery/contract award method to be used for each construction contract valued at or above \$50,000. To assist the Board, the Superintendent shall recommend the project delivery/contract award method that he or she determines provides the best value to the District. [See CV series generally and CBB(LEGAL) for requirements if federal funds are involved.]

For construction contracts valued at or above \$100,000, the Superintendent shall also submit the resulting contract to the Board for approval. Lesser expenditures for construction and construction-related materials or services shall be at the discretion of the Superintendent and consistent with law and policy. [See also CH and CBB(LEGAL)]

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**Note:** For provisions regarding delegation of authority for construction contracts in the event of a catastrophe, emergency, or natural disaster affecting the District, see CH(LOCAL).

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**Change Orders**

Change orders permitted by law shall be approved by the Board or its designee prior to any changes being made in the approved plans or the actual construction of the facility.

Change orders valued at or above \$100,000 shall require Board approval. The Superintendent or his designee shall be authorized to approve change orders of a lesser amount.

**Project Administration**

All construction projects shall be administered by the Superintendent or designee.

The Superintendent shall keep the Board informed concerning construction projects and also shall provide information to the general public.

**Final Payment**

The District shall not make final payments for construction or the supervision of construction until the work has been completed and the Board has accepted the work.

# Lockhart Independent School District Board of Trustees

Date of Board Meeting:

Agenda Item:

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AGENDA SECTION:

READING:

PREVIOUS BOARD REVIEW DATE:

TYPE OF ACTION:

DEPARTMENT:

DISTRICT GOAL(S) ALIGNMENT:

1. Create innovative opportunities for ALL students to prepare for success beyond graduation.
2. Every campus will have an A rating by 2028 through exemplary teaching and student-centered learning.
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AGENDA TITLE:

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BACKGROUND INFORMATION:

ATTACHMENT(S):

RECOMMENDATION:

RECOMMENDED MOTION:



## (LOCAL) Policy Comparisons

These documents are generated by an automated process that compares the updated policy to the current policy as found in TASB records.

In this packet, you will find:

- Policies being recommended for revision (annotated)
- New policies (not annotated)
- Policies recommended for deletion (annotated in PDF; not shown in Word)

Annotations are shown as follows:

- Deletions are in a red strike-through font: ~~deleted text~~.
- Additions are in a blue, bold font: **new text**.
- Blocks of text that were moved without changes are shown in green, with double underline and double strike-through formatting to distinguish the text's new placement from its original location: ~~moved text~~ becomes moved text.
- Revision bars appear in the right margin to show sections with changes.

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**Note:** While the annotation software competently identifies simple changes, large or complicated changes—as in an extensive rewrite—may be more difficult to follow. In addition, TASB's recent changes to the policy templates to facilitate accessibility sometimes makes formatting changes appear tracked, even though the text remains the same.

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For further assistance in understanding policy changes, please refer to the explanatory notes in your Localized Policy Manual update packet or contact your policy consultant.

<b>Contact:</b>	<b>School Districts and Education Service Centers</b>	<b>Community Colleges</b>
	<a href="mailto:policy.service@tasb.org">policy.service@tasb.org</a>	<a href="mailto:colleges@tasb.org">colleges@tasb.org</a>
	800.580.7529 512.467.0222	800.580.1488 512.467.3689

BOARD MEMBERS  
ELECTIONS

BBB  
(LOCAL)

**Court Order**

The District shall conduct its Board member elections in accordance with the Order of Agreed Judgment in Villalobos v. Lockhart ISD, Cause No. A-87-CA-526, United States District Court, Western District of Texas, Austin Division, November 1, 1988, as long as such court order or other binding legal determination is in effect. A copy of the court order or other binding legal determination may be obtained from the Superintendent's office.

**Membership**

The Board shall consist of seven members.

**Method of Election**

Election of Board members shall be a combination of at large and by single-member districts.

**Election Date**

General election of Board members shall be on the November uniform election date.

**Terms and Election Schedule**

Three Board members shall be elected at large for four year-terms, with elections conducted biennially, as follows:

At Large

The election of three Board members shall be held in ~~2018, 2022,~~ 2026, 2030, 2034, and in four-year intervals thereafter.

Single-Member Districts

Four Board members shall be elected by single-member districts for four-year terms, with elections conducted biennially, as follows:

*Districts 1, 2, 3, and 4*

The election for single-member district numbers 1, 2, 3, and 4 shall be held in ~~2020, 2024,~~ 2028, 2032, and in four-year intervals thereafter.

**Method of Voting**

At Large

*Cumulative Voting*

The District shall use cumulative voting, under which a voter is entitled to cast a number of votes equal to the number of at-large ~~seats~~positions in the election for one or more candidates in any combination. The at-large candidates receiving the highest number of votes for the number of ~~seats~~positions with expiring terms shall be elected.

Single-Member Districts

*Majority Vote*

To be elected, a candidate must receive a majority of the votes cast for the single-member district.

**Emergency  
Operations Plan**

The Superintendent shall ensure updating of the District's emergency operations plan and ongoing staff training.

As required by law, the emergency operations plan shall include the District's procedures addressing:

1. Reasonable security measures when District property is used as a polling place;
2. Response to an active shooter emergency; ~~and~~
3. Response to a nearby train derailment, as applicable; and
- ~~3-4.~~ Access to campus buildings and materials necessary for a substitute teacher to carry out the duties of a District employee during an emergency or an emergency drill.

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~~**Note:** — This local policy has been revised in accordance with the District's innovation plan.<sup>4</sup>~~

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~~**Group Health Benefits**~~

~~In accordance with the District's innovation plan, the District is exempt from the requirements of the Education Code regarding group health benefits for school employees and the prohibition on making group health coverage available after coverage under TRS ActiveCare has begun.~~

**District Contribution**

The Board annually shall determine the District's contribution to employee health insurance premiums as part of the budget development and adoption process.

For purposes of the District contribution to employees' health insurance premiums, the Board may distinguish between full-time and part-time employees, as those terms are defined for other benefits, with at least the minimum contribution required by law for all Texas Teacher Retirement System (TRS)-eligible employees who enroll in health insurance through the District. Beginning with employees hired after April 22, 2004, part-time employment shall be defined as working a maximum of 30 hours per week.

**Continuation Coverage**

The District shall continue its contribution toward the cost of the employee's group health insurance coverage while the employee is on paid leave or, if applicable, while the employee is on family and medical leave. [See DEC]

The District shall not otherwise expend public funds for group health insurance coverage of an employee who is not on paid leave status. However, an employee who is not on paid leave status or Family and Medical Leave Act (FMLA) leave shall be allowed to continue group health insurance coverage, at his or her own expense, for the period specified in the District's group health insurance plan.

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<sup>4</sup> ~~Innovation Plan:~~  
~~<http://www.lockhartisd.org/about-us/district-of-innovation>~~

## Complaints

In this policy, the terms “complaint” and “grievance” shall have the same meaning.

### Other Complaint Processes

Student or parent complaints shall be filed in accordance with this policy, except as required by the policies listed below. Some of these policies require appeals to be submitted in accordance with FNG after the relevant complaint process:

1. Complaints alleging discrimination or harassment based on race, color, religion, sex, gender, national origin, age, or disability shall be submitted in accordance with FFH.
2. Complaints concerning dating violence shall be submitted in accordance with FFH.
3. Complaints concerning retaliation related to discrimination and harassment shall be submitted in accordance with FFH.
4. Complaints concerning bullying or retaliation related to bullying shall be submitted in accordance with FFI.
5. Complaints concerning failure to award credit or a final grade on the basis of attendance shall be submitted in accordance with FEC.
6. Complaints concerning expulsion shall be submitted in accordance with FOD and the Student Code of Conduct.
7. Complaints concerning any final decisions of the gifted and talented selection committee regarding selection for or exit from the gifted program shall be submitted in accordance with EHBB.
8. Complaints [within the scope of Section 504, including complaints](#) concerning identification, evaluation, or educational placement of a student with a disability, ~~within the scope of Section 504~~ shall be submitted in accordance with FB and the procedural safeguards handbook.
9. [Complaints within the scope of the Individuals with Disabilities Education Act, including complaints](#) ~~Complaints~~ concerning identification, evaluation, educational placement, or discipline of a student with a disability, ~~within the scope of the Individuals with Disabilities Education Act~~ shall be submitted in accordance with EHBAE, FOF, and the procedural safeguards handbook provided to parents of all students referred to special education.
10. Complaints concerning instructional resources shall be submitted in accordance with [the EF series](#).

STUDENT RIGHTS AND RESPONSIBILITIES  
STUDENT AND PARENT COMPLAINTS/GRIEVANCES

FNG  
(LOCAL)

11. Complaints concerning a commissioned peace officer who is an employee of the District shall be submitted in accordance with CKE.
12. Complaints concerning intradistrict transfers or campus assignment shall be submitted in accordance with FDB.
13. Complaints concerning admission, placement, or services provided for a homeless student shall be submitted in accordance with FDC.
14. Complaints concerning disputes regarding a student's eligibility for free or reduced-priced meal programs shall be submitted in accordance with COB.

Complaints regarding refusal of entry to or ejection from District property based on Education Code 37.105 shall be filed in accordance with this policy. However, the timelines shall be adjusted as necessary to permit the complainant to address the Board in person within 90 calendar days of filing the initial complaint, unless the complaint is resolved before the Board considers it. [See GKA(LEGAL)]

**Extracurricular  
Activity Complaints**

For a complaint concerning a student's participation in an extracurricular activity that does not involve a violation of a right guaranteed by Education Code Chapter 26, the Level Two decision is final and may not be appealed to the Board.

**Notice to Students  
and Parents**

The District shall inform students and parents of this policy through appropriate District publications.

**Guiding Principles**

Informal Process

The Board encourages students and parents to discuss their concerns with the appropriate teacher, principal, or other campus administrator who has the authority to address the concerns. Concerns should be expressed as soon as possible to allow early resolution at the lowest possible administrative level.

Informal resolution shall be encouraged but shall not extend any deadlines in this policy, except by mutual written consent.

Formal Process

A student or parent may initiate the formal process described below by timely filing a written complaint form.

Even after initiating the formal complaint process, students and parents are encouraged to seek informal resolution of their concerns. A student or parent whose concerns are resolved may withdraw a formal complaint at any time.

The process described in this policy shall not be construed to create new or additional rights beyond those granted by law or Board

STUDENT RIGHTS AND RESPONSIBILITIES  
STUDENT AND PARENT COMPLAINTS/GRIEVANCES

FNG  
(LOCAL)

policy, nor to require a full evidentiary hearing or “mini-trial” at any level.

**Freedom from Retaliation**

Neither the Board nor any District employee shall unlawfully retaliate against any student or parent for bringing a concern or complaint.

**General Provisions**

Filing

Complaint forms and appeal notices may be filed by hand-delivery, by electronic communication, including email and fax, or by U.S. Mail. Hand-delivered filings shall be timely filed if received by the appropriate administrator or designee by the close of business on the deadline. Filings submitted by electronic communication shall be timely filed if they are received by the close of business on the deadline, as indicated by the date/time shown on the electronic communication. Mail filings shall be timely filed if they are post-marked by U.S. Mail on or before the deadline and received by the appropriate administrator or designated representative no more than three days after the deadline.

Scheduling Conferences

The District shall make reasonable attempts to schedule conferences at a mutually agreeable time. If a student or parent fails to appear at a scheduled conference, the District may hold the conference and issue a decision in the student’s or parent’s absence.

Response

At Levels One and Two, “response” shall mean a written communication to the student or parent from the appropriate administrator. Responses may be hand-delivered, sent by electronic communication to the student’s or parent’s email address of record, or sent by U.S. Mail to the student’s or parent’s mailing address of record. Mailed responses shall be timely if they are postmarked by U.S. Mail on or before the deadline.

Days

“Days” shall mean District business days, unless otherwise noted. In calculating timelines under this policy, the day a document is filed is “day zero.” The following business day is “day one.”

Representative

“Representative” shall mean any person who or organization that is designated by the student or parent to represent the student or parent in the complaint process. A student may be represented by an adult at any level of the complaint.

The student or parent may designate a representative through written notice to the District at any level of this process. If the student or parent designates a representative with fewer than three days’ notice to the District before a scheduled conference or hearing, the District may reschedule the conference or hearing to a later date, if desired, in order to include the District’s counsel. The District may be represented by counsel at any level of the process.

STUDENT RIGHTS AND RESPONSIBILITIES  
STUDENT AND PARENT COMPLAINTS/GRIEVANCES

FNG  
(LOCAL)

**Consolidating Complaints**                      Complaints arising out of an event or a series of related events shall be addressed in one complaint. A student or parent shall not file separate or serial complaints arising from any event or series of events that have been or could have been addressed in a previous complaint.

**Untimely Filings**                              All time limits shall be strictly followed unless modified by mutual written consent.

If a complaint form or appeal notice is not timely filed, the complaint may be dismissed, on written notice to the student or parent, at any point during the complaint process. The student or parent may appeal the dismissal by seeking review in writing within ten days from the date of the written dismissal notice, starting at the level at which the complaint was dismissed. Such appeal shall be limited to the issue of timeliness.

**Costs Incurred**                                Each party shall pay its own costs incurred in the course of the complaint.

**Complaint and Appeal Forms**              Complaints and appeals under this policy shall be submitted in writing on a form provided by the District.

Copies of any documents that support the complaint should be attached to the complaint form. If the student or parent does not have copies of these documents, copies may be presented at the Level One conference. After the Level One conference, no new documents may be submitted by the student or parent unless the student or parent did not know the documents existed before the Level One conference.

A complaint or appeal form that is incomplete in any material aspect may be dismissed but may be refiled with all the required information if the refile is within the designated time for filing.

**Level One**

Complaint forms must be filed:

1. Within 15 days of the date the student or parent first knew, or with reasonable diligence should have known, of the decision or action giving rise to the complaint or grievance; and
2. With the lowest level administrator who has the authority to remedy the alleged problem.

In most circumstances, students and parents shall file Level One complaints with the campus principal.

If the only administrator who has authority to remedy the alleged problem is the Superintendent or designee, the complaint may begin at Level Two following the procedure, including deadlines, for filing the complaint form at Level One.

If the complaint is not filed with the appropriate administrator, the receiving administrator must note the date and time the complaint form was received and immediately forward the complaint form to the appropriate administrator.

The appropriate administrator shall investigate as necessary and schedule a conference with the student or parent within ten days after receipt of the written complaint. The administrator may set reasonable time limits for the conference.

Absent extenuating circumstances, the administrator shall provide the student or parent a written response within ten days following the conference. The written response shall set forth the basis of the decision. In reaching a decision, the administrator may consider information provided at the Level One conference and any other relevant documents or information the administrator believes will help resolve the complaint.

## **Level Two**

If the student or parent did not receive the relief requested at Level One or if the time for a response has expired, the student or parent may request a conference with the Superintendent or designee to appeal the Level One decision.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level One response or, if no response was received, within ten days of the Level One response deadline

After receiving notice of the appeal, the Level One administrator shall prepare and forward a record of the Level One complaint to the Level Two administrator. The student or parent may request a copy of the Level One record.

The Level One record shall include:

1. The original complaint form and any attachments.
2. All other documents submitted by the student or parent at Level One.
3. The written response issued at Level One and any attachments.
4. All other documents relied upon by the Level One administrator in reaching the Level One decision.

The Superintendent or designee shall schedule a conference within ten days after the appeal notice is filed. The conference shall be limited to the issues and documents considered at Level One. At the conference, the student or parent may provide information

concerning any documents or information relied upon by the administration for the Level One decision. The Superintendent or designee may set reasonable time limits for the conference.

The Superintendent or designee shall provide the student or parent a written response within ten days following the conference. The written response shall set forth the basis of the decision. In reaching a decision, the Superintendent or designee may consider the Level One record, information provided at the Level Two conference, and any other relevant documents or information the Superintendent or designee believes will help resolve the complaint.

Recordings of the Level One and Level Two conferences, if any, shall be maintained with the Level One and Level Two records.

### **Level Three**

With the exception of complaints regarding extracurricular activities, described above, if the student or parent did not receive the relief requested at Level Two or if the time for a response has expired, the student or parent may appeal the decision to the Board.

The appeal notice must be filed in writing, on a form provided by the District, within ten days of the date of the written Level Two response or, if no response was received, within ten days of the Level Two response deadline.

The Superintendent or designee shall inform the student or parent of the date, time, and place of the Board meeting at which the complaint will be on the agenda for presentation to the Board.

The Superintendent or designee shall provide the Board the record of the Level Two appeal. The student or parent may request a copy of the Level Two record.

The Level Two record shall include:

1. The Level One record.
2. The notice of appeal from Level One to Level Two.
3. The written response issued at Level Two and any attachments.
4. All other documents relied upon by the administration in reaching the Level Two decision.

The appeal shall be limited to the issues and documents considered at Level Two, except that if at the Level Three hearing the administration intends to rely on evidence not included in the Level Two record, the administration shall provide the student or parent notice of the nature of the evidence at least three days before the hearing.

The District shall determine whether the complaint will be presented in open or closed meeting in accordance with the Texas Open Meetings Act and other applicable law. [See BE]

The presiding officer may set reasonable time limits and guidelines for the presentation, including an opportunity for the student or parent and administration to each make a presentation and provide rebuttal and an opportunity for questioning by the Board. The Board shall hear the complaint and may request that the administration provide an explanation for the decisions at the preceding levels.

In addition to any other record of the Board meeting required by law, the Board shall prepare a separate record of the Level Three presentation. The Level Three presentation, including the presentation by the student or parent or the student's representative, any presentation from the administration, and questions from the Board with responses, shall be recorded by audio recording, video/audio recording, or court reporter.

The Board shall then consider the complaint. It may give notice of its decision orally or in writing at any time up to and including the next regularly scheduled Board meeting. If the Board does not make a decision regarding the complaint by the end of the next regularly scheduled meeting, the lack of a response by the Board upholds the administrative decision at Level Two.

**Discipline  
Philosophy**

The goal of the District is to give all children the best opportunity to learn. To achieve this, discipline is necessary.

The District believes that:

1. Discipline begins at home.
2. Enforcement of school discipline is the responsibility of the teacher with strong support from parents, administrators, and Board members.
3. Discipline must be firm, fair, and consistent.
4. Students must attend school regularly, follow the rules, respect the rights of others, and work to the best of their abilities.

**Student Code of  
Conduct**

The District's rules of discipline are maintained in the Board-adopted Student Code of Conduct and are established to support an environment conducive to teaching and learning.

Rules of conduct and discipline shall not have the effect of discriminating on the basis of gender, race, color, disability, religion, ethnicity, or national origin.

At the beginning of the school year and throughout the school year as necessary, the Student Code of Conduct shall be:

1. Posted and prominently displayed at each campus or made available for review in the principal's office, as required by law; and
2. Made available on the District's website and/or as a hard copy to students, parents, teachers, administrators, and others on request.

Revisions

Revisions to the Student Code of Conduct approved by the Board during the year shall be made available promptly to students and parents, teachers, administrators, and others.

**Extracurricular  
Standards of  
Behavior**

With the approval of the principal and Superintendent, sponsors and coaches of extracurricular activities may develop and enforce standards of behavior that are higher than the District-developed Student Code of Conduct and may condition membership or participation in the activity on adherence to those standards. Extracurricular standards of behavior may take into consideration conduct that occurs at any time, on or off school property.

A student shall be informed of any extracurricular behavior standards at the beginning of each school year or when the student first begins participation in the activity. A student and his or her parent shall sign and return to the sponsor or coach a statement that they

have read the extracurricular behavior standards and consent to them as a condition of participation in the activity.

Standards of behavior for an extracurricular activity are independent of the Student Code of Conduct. Violations of these standards of behavior that are also violations of the Student Code of Conduct may result in independent disciplinary actions.

A student may be removed from participation in extracurricular activities or may be excluded from school honors for violation of extracurricular standards of behavior for an activity or for violation of the Student Code of Conduct.

**“Parent” Defined**

Throughout the Student Code of Conduct and discipline policies, the term “parent” includes a parent, legal guardian, or other person having lawful control of the child.

**General Discipline Guidelines**

A District employee shall adhere to the following general guidelines when imposing discipline:

1. A student shall be disciplined when necessary to improve the student’s behavior, to maintain order, or to protect other students, school employees, or property.
2. A student shall be treated fairly and equitably. Discipline shall be based on an assessment of the circumstances of each case. Factors to consider shall include:
  - a. The seriousness of the offense;
  - b. The student’s age;
  - c. The frequency of misconduct;
  - d. The student’s attitude;
  - e. The potential effect of the misconduct on the school environment;
  - f. Requirements of Chapter 37 of the Education Code; and
  - g. The Student Code of Conduct adopted by the Board.
3. Before a student under 18 is assigned to detention outside regular school hours, notice shall be given to the student’s parent to inform him or her of the reason for the detention and permit arrangements for necessary transportation.

**Corporal Punishment**

The Board prohibits the use of corporal punishment in the District. Students shall not be spanked, paddled, or subjected to other physical force as a means of discipline for violations of the Student Code of Conduct.

**Physical Restraint**

**Note:** [A District employee may restrain a student with a disability who receives special education services only in accordance with law. \[See FOF\(LEGAL\)\]](#)

Within the scope of an employee's duties, a District employee may physically restrain a student if the employee reasonably believes restraint is necessary in order to:

1. Protect a person, including the person using physical restraint, from physical injury.
2. Obtain possession of a weapon or other dangerous object.
3. [Protect property from serious damage.](#)
- ~~3.4.~~ Remove a student refusing a lawful command of a school employee from a specific location, including a classroom or other school property, in order to restore order or to impose disciplinary measures.

~~4. Control an irrational student.~~

~~5.1. [Protect property from serious damage.](#)~~

~~A District employee may restrain a student with a disability who receives special education services only in accordance with law. [See FOF(LEGAL)]~~

**Video and Audio Monitoring**

Video and audio recording equipment shall be used for safety purposes to monitor student behavior on District property.

The District shall post signs notifying students and parents about the District's use of video and audio recording equipment. Students shall not be notified when the equipment is turned on.

Use of Recordings

The principal shall review recordings as needed, and evidence of student misconduct shall be documented. A student found to be in violation of the District's Student Code of Conduct shall be subject to appropriate discipline.

Access to Recordings

Recordings shall remain in the custody of the campus principal and shall be maintained as required by law. A parent or student who wishes to view a recording in response to disciplinary action taken against the student may request such access under the procedures set out by law. [See FL(LEGAL)]

# Lockhart Independent School District Board of Trustees

Date of Board Meeting:

Agenda Item:

---

AGENDA SECTION:

READING:

PREVIOUS BOARD REVIEW DATE:

TYPE OF ACTION:

DEPARTMENT:

## DISTRICT GOAL(S) ALIGNMENT:

1. Create innovative opportunities for ALL students to prepare for success beyond graduation.
2. Every campus will have an A rating by 2028 through exemplary teaching and student-centered learning.
3. Cultivate an environment where our employees choose Lockhart Independent School District.

AGENDA TITLE:

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BACKGROUND INFORMATION:

ATTACHMENT(S):

RECOMMENDATION:

RECOMMENDED MOTION:



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**Lockhart ISD  
Cash Investments Report  
As of April 30, 2023**

	Texas Term	Texpool	First Lockhart	District Funds Total
General Fund	\$ 304,763	\$ 22,946,880	\$ 1,773,038	\$ 25,024,681
Redemption Fund			\$ 2,187	\$ 2,187
Interest & Sinking Fund	\$ 1,356,950	\$ 7,948,166	\$ 350,807	\$ 9,655,923
Payroll			\$ 534,244	\$ 534,244
School Nutrition	\$ 6,880	\$ 2,784,133	\$ 696,993	
2023 Bond Proceeds	\$ 71,206,962			\$ 71,206,962
Maintenance Debt Service				\$ -
<b>District Funds</b>	<b>\$ 72,875,554</b>	<b>\$ 33,679,179</b>	<b>\$ 3,357,268</b>	<b>\$ 106,423,996</b>
C.D. Marshall JHS Scholarship		\$ 31,752		\$ 31,752
G.F. Hudnall Scholarship		\$ 15,585		\$ 15,585
L. White Scholarship		\$ 14,573		\$ 14,573
Mary Barron Canning Sanders Schol.		\$ 6,208		\$ 6,208
Fiduciary Funds			\$ 26,089	\$ 26,089
Roland Endowment Scholarship			\$ 20,712	\$ 20,712
Canning Engineering Scholarship		\$ 24,380		\$ 24,380
Mohle Scholarship		\$ 1,043		\$ 1,043
Top Ten Scholarship			\$ 162,270	\$ 162,270
<b>Scholarship Funds</b>	<b>\$ -</b>	<b>\$ 93,541</b>	<b>\$ 209,072</b>	<b>\$ 302,613</b>
Monthly rate in Bank/Pool:	5.03%	4.99%	1.00%	

<b>Earnings from Temporary Investment Budget Amount (General Fund)</b>	<b>\$ 25,000.00</b>
<b>Earnings Realized</b>	<b>\$ 711,608</b>
<b>Budget Balance (Interest received in excess of budget)</b>	<b>\$ (686,608)</b>

# Lockhart Independent School District Board of Trustees

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# LOCKHART I.S.D. BOARD

## Tax Collection Report

APRIL 2023

	April	Prior Months	TOTAL	PRIOR YEAR
2022 Tax Collection	\$217,210.23	\$28,819,967.20	\$29,037,177.43	\$22,898,091.26
2021 & Prior Collection	\$61,068.96	\$1,186,780.50	\$1,247,849.46	\$1,042,847.00
<b>Total Tax Collection =</b>	<b>\$278,279.19</b>	<b>\$30,006,747.70</b>	<b>\$30,285,026.89</b>	<b>\$23,940,938.26</b>

note: Above figures include penalties and interest collected  
 2022 Original Levy                      \$31,092,500.44

April 30, 2023 Percent of 2022 Tax Collected                      94.18%

April 30, 2022 Percent of 2021 Tax Collected                      94.55%

April 30, 2021 Percent of 2020 Tax Collected                      94.29%

April 30, 2023 - Balance of Delinquent Tax                      \$1,985,129.02

April 30, 2022 - Balance of Delinquent Tax                      \$1,859,419.25

April 30, 2021 - Balance of Delinquent Tax                      \$1,665,976.04

Corrections made to Current Tax Roll                      (\$13,156.34)

Corrections made to Delinquent Tax Roll                      \$10,163.99

**NOTE:**

Caldwell County Appraisal District has collected and disbursed Attorney Fees in the amount of \$0.00

Submitted by:

*Shanna Ramzinski*

Shanna Ramzinski  
 Chief Appraiser  
 Caldwell County Appraisal District

# Lockhart Independent School District Board of Trustees

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AGENDA TITLE:

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RECOMMENDATION:

RECOMMENDED MOTION:

**REGION 20 PURCHASING COOPERATIVE**

ESC-20 Participation Commitment for 2023-2024

District Name: \_\_\_\_\_ County/District Number: \_\_\_\_\_

Education Service Center, Region 20 (Center) and the above named school district or open enrollment charter school (District) enter into the following cooperative service arrangement for the 2023-2024 school year, August 1, 2023 through July 31, 2024:

The Center will:

- Provide a resolution to be approved by the District's board for ESC-20 to act on its behalf in soliciting proposals
- Revise specifications each year
- Prepare and combine quantity request forms for each proposal
- Handle bidding procedures
- Abide by all procurement laws
- Enter proposals for tabulation and evaluation
- Arrange for an Award Committee to test and award proposals
- Develop award information forms for district use
- Send award information to vendors
- Develop system for gathering evaluation information from members on vendor performance and product quality
- Provide comparison information with previous awards to evaluate effectiveness of proposals
- Provide technical assistance to coop members
- Includes membership for the participation in PACE Purchasing Cooperative

The District will:

- Ensure an approved resolution to participate in Cooperative is on file with ESC-20
- Designate a district employee to serve as a liaison with ESC-20 for each of the selected options below
- Provide release time for meetings, proposal openings, and testing assistance as needed
- When requested and agreed, provide work space and additional employees to assist with testing
- Identify delivery location within District on purchase orders
- Prepare purchase orders for items awarded on proposals
- Ensure timely payments to vendors who receive proposal awards
- Provide ESC-20 with evaluation forms regarding vendor and product concerns

<b>OPTION 1</b>	<b>GENERAL SUPPLIES</b>	<b>Participation fee: \$875</b>
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The Cooperative will solicit proposals for office and computer supplies, paper supplies, art supplies, PE supplies, visually impaired, instructional supplies, adaptive & assistive devices, custodial supplies, air filter, printer cartridges, electrical supplies, reproduction supplies, graphing calculators, floor care products and machine pads and general supplies. The general supplies proposals cover the areas of athletic equipment, band instruments, carpet/flooring, first aid and medical supplies, maintenance, merchandise, playground equipment, lawn and garden supplies, fire extinguishers, loss prevention supplies, stage equipment, bus and vehicle parts, furniture, marquees and uniforms. Also included is participation in PACE and its associated solicitations.

<b>OPTION 2</b>	<b>EDUCATIONAL TECHNOLOGY</b>	<b>Participation fee: \$772</b>
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The Cooperative will solicit proposals for Apple Microcomputer products, MS-DOS Microcomputer products, business office equipment, educational software, and other educational technology products and services requested by member districts. Also included is participation in PACE and its associated solicitations.

**REGION 20 PURCHASING COOPERATIVE**

ESC-20 Participation Commitment for 2023-2024

District Name: \_\_\_\_\_ County/District Number: \_\_\_\_\_

**Please circle options:**

<b>OPTION 1</b>	<b>\$875</b>		
<b>OPTION 2</b>	<b>\$772</b>		

Superintendent Signature: \_\_\_\_\_

ESC-20 Contact Person:

District Contact Person: \_\_\_\_\_

Jim Metzger

E-Mail/Phone: \_\_\_\_\_

E-mail: [jim.metzger@esc20.net](mailto:jim.metzger@esc20.net)

(210) 370-5204

**Please return by July 13, 2023 to:** ESC-20 Business Office **Maintain a copy for district file.**

1314 Hines Avenue  
San Antonio, TX 78208-1899

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*--For ESC-20 Use Only--*

**Revenue Codes:**

*Option 1 199-00-5729-00-240-400*

*Option 2 199-00-5729-04-240-400*

**Distribution:** *Business Office*

**Division:** *Business & Human Resources*

**Subscription Licensing Agreement (SLA) for Renewing Districts  
2023-2024 School Year**

**School District/Charter Name:**

The above listed district/charter agrees to purchase **Eduphoria!** (EdTech contract #ET20200707) and/or **TEKS Bank Item Bank** from Education Service Center Region 13 during the 2023-2024 school year.

**Description:**

ESC Region 13, in an agreement with **Eduphoria!**, will support the **Eduphoria! Suite, NEW Aware Premium, Strive and Forethought** for Region 13 districts. **TEKS Bank Item Bank** is supported through Education Service Center, Region 10 with the assistance of ESC Region 13.

**Education Service Center Region 13 agrees to:**

- Provide full access to the **Eduphoria!** online system.
- Coordinate with Region 10 **TEKS Bank** team and **Eduphoria!** on end-user issues.
- Provide consultation and technical assistance.
- Provide fee-based training for teachers, leaders and system administrators.

**Each participating school district agrees to:**

- Designate a district contact/representative for coordination purposes, including but not limited to, maintenance of district databases, allocation of district level accounts, and participation in update training.
- Abide by the terms of the District User License Agreement attached.
- **Provide the ESC Eduphoria! Team contact with a system administrator district login.**

**2023-2024 Pricing information for renewing district licenses Eduphoria! and/or TEKS Bank**

<b>LICENSE PACKAGES</b>	<b>FEE/Campus</b>	<b># of Licenses</b>	<b>EXT PRICE</b>
<b>Eduphoria Suite</b> (all six applications)	<b>\$ 2860</b>	<b>9</b>	<b>25,740</b>
<b>Aware</b> (Maintenance) Only available to select districts	<b>\$ 1750</b>	<b>0</b>	<b>0</b>
<b>Aware Premium Only</b>	<b>\$ 2590</b>	<b>0</b>	<b>0</b>
<b>Instructional Package</b> (Aware+Strive+Forethought)	<b>\$ 3685</b>	<b>0</b>	<b>0</b>
<b>Aware Premium + Strive</b>	<b>\$3126.50</b>	<b>0</b>	<b>0</b>
<b>TEKS Bank Item Bank Cost per Student</b>	<b>\$ 1.30</b>	<b>6443</b>	<b>8,375.90</b>
District Enrollment Count October 2022*:	6300		
<b>Total Cost:</b>			<b>34, 115.90</b>
*Source - Ask TED fall count previous school year			

District PO Number include ET20200707	49
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Name of District Contact Person	
Email address	
Phone	

**Please return to:**

Attn: Dixie Binford

Administrative Specialist

dixie.binford@esc13.txed.net

512-919-5148



**REGION 13**

EDUCATION SERVICE CENTER

Signature of Superintendent/Designee

# Lockhart Independent School District Board of Trustees

Date of Board Meeting:

Agenda Item:

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RECOMMENDATION:

RECOMMENDED MOTION:



## Timeline for Budget/Tax Rate Adoption and Voter-Approval Tax Rate Elections

Published online in [TASB School Law eSource](#)

**NOTE: This information is subject to change by the 88th Texas Legislature. A district must ensure that it complies with the most recent statutory requirements when it adopts its tax rate for 2023.**

The dates below apply to school districts adopting their budgets and tax rates and conducting voter-approval tax rate elections (VATRE) in 2023. The year is included below if the date changes each year.

Prior to conducting a VATRE, a district must conduct an efficiency audit in accordance with the deadlines set out below and guidelines established by the [Legislative Budget Board](#).<sup>1</sup>

TASB Legal Services' [School District Budget and Tax Rate Adoption in 2023](#) contains detailed information about each requirement and deadline below. For more information on voter-approval tax rate elections, see TASB Legal Services' [School District Voter-Approval Tax Rate Elections in 2023](#).

- **April 30:** Deadline for chief appraiser to certify estimate of district's taxable property values<sup>2</sup>
- **June 19:** Deadline for districts with July 1 fiscal year to prepare a proposed budget<sup>3</sup>
- **June 20:** Latest date for districts with July 1 fiscal year to publish Notice of Public Meeting to Discuss Budget and Proposed Tax Rate (Texas Comptroller's Form 50-280)<sup>4</sup>
- **June 30:** Deadline to adopt budget for district with July 1 fiscal year<sup>5</sup>
- **July 7, 2023 (no later than 4 months before Election Day):** Select auditor for efficiency audit<sup>6</sup>
- **July 18–August 1:** TEA data collection from districts regarding taxable property values and local exemption amounts for the preceding and current tax years<sup>7</sup>
- **July 25:** Deadline for chief appraiser to provide certified appraisal roll to district's tax assessor; if the appraisal review board has not approved the appraisal records by July 20, the chief appraiser must prepare and certify an *estimate* of taxable property value by July 25<sup>8</sup>
- **August 1:** Deadline for tax assessor to determine district property values and submit appraisal roll to the board<sup>9</sup>
- **August 5:** Deadline for TEA to issue preliminary maximum compressed tax rate (MCR) for each district<sup>10</sup>

- **10 Calendar Days after TEA approves preliminary MCR:**
  - Deadline to appeal preliminary MCR<sup>11</sup>
  - If not appealed, preliminary MCR becomes final<sup>12</sup>
- **August 11, 2023:** Latest date for districts *planning a VATRE* to publish Notice of Public Meeting to Discuss Budget and Proposed Tax Rate (Texas Comptroller’s Form 50-280)<sup>13</sup>
- **August 20:** Deadline for districts with September 1 fiscal year to prepare a proposed budget<sup>14</sup>
- **August 21:** Latest date for districts with September 1 fiscal year to publish Notice of Public Meeting to Discuss Budget and Proposed Tax Rate (Texas Comptroller’s Form 50-280) *if not conducting a VATRE*<sup>15</sup>
- **August 21, 2023 (78th day before Election Day):** Deadline to order an election to be held on the November uniform election date; a district must adopt its budget and tax rate *before* ordering an election<sup>16</sup>
- **August 31:**
  - Deadline to adopt budget for district with September 1 fiscal year<sup>17</sup>
  - Deadline for TEA to issue final determination of MCR appeal<sup>18</sup>
- **September 30 or 60 days after receiving certified appraisal roll (whichever is later):** Tax rate adopted *before* the later of these dates if not conducting a VATRE<sup>19</sup>
- **October 7, 2023 (no later than three months after auditor appointment):** Efficiency audit completed<sup>20</sup>
- **October 8, 2023 (no later than thirty days before Election Day):** Efficiency audit results posted on district website; before the VATRE, the board must hold an open meeting to discuss the results<sup>21</sup>
- **November 7, 2023 (First Tuesday after first Monday in November):** Uniform election date for VATRE<sup>22</sup>

This document is continually updated at [tasb.org/services/legal-services/tasb-school-law-essource/business/documents/timeline-for-budget-tax-rate-adoption-and-vatre.pdf](https://tasb.org/services/legal-services/tasb-school-law-essource/business/documents/timeline-for-budget-tax-rate-adoption-and-vatre.pdf). For more information on school law topics, visit TASB School Law eSource at [schoollawesource.tasb.org](https://schoollawesource.tasb.org).

*This document is provided for educational purposes and contains information to facilitate a general understanding of the law. References to judicial or other official proceedings are intended to be a fair and impartial account of public records, which may contain allegations that are not true. This publication is not an exhaustive treatment of the law, nor is it intended to substitute for the advice of an attorney. Consult your own attorney to apply these legal principles to specific fact situations.*

*Published May 2023*

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- <sup>1</sup> Tex. Educ. Code § 11.184. The board of a district located in an area declared a disaster area by the governor under Texas Government Code chapter 418 may hold a VATRE during the two-year period following the date of the declaration *without* conducting an efficiency audit. Tex. Educ. Code § 11.184(b-1).
  - <sup>2</sup> Tex. Tax Code § 26.01(e).
  - <sup>3</sup> Tex. Educ. Agency, [Financial Accountability System Resource Guide](#), (FASRG), *Module 1, Financial Accounting and Reporting*, section 1.1.3, p. 13, and *Module 4, Auditing*, section 4.6.4, Exhibit 1, p. 59 (2022).
  - <sup>4</sup> Because a district will not have its maximum compressed tax rate (MCR) from TEA by this date, a district can use the district’s MCR for 2022 as its maximum tier one tax rate and add the desired number of tier two pennies for the purpose of publishing the required Notice of Public Meeting to Discuss Budget and Proposed Tax Rate. See Tex. Educ. Code § 48.2551 (a district’s MCR is calculated by TEA and is the lesser of the district’s prior year MCR, the state compression rate, or the rate determined by a statutory formula if the district’s taxable property value for the current year exceeds the district’s prior year value by at least 2.5 percent.)
  - <sup>5</sup> Tex. Educ. Agency, [FASRG](#), *Module 1, Financial Accounting and Reporting*, section 1.1.3, p. 13, and *Module 4, Auditing*, section 4.6.4, Exhibit 1, p. 59 (2022).
  - <sup>6</sup> Tex. Educ. Code § 11.184(d).
  - <sup>7</sup> 19 Tex. Admin. Code § 61.1000(c).
  - <sup>8</sup> Tex. Tax Code § 26.01(a)-(a-1); see also Tex. Tax Code § 26.04(c-2) (if the assessor received a certified estimate, the taxing unit’s designated officer or employee shall calculate the no-new-revenue tax rate and voter-approval tax rate using the certified estimate).
  - <sup>9</sup> Tex. Tax Code § 26.04(a)-(b).
  - <sup>10</sup> 19 Tex. Admin. Code § 61.1000(d).
  - <sup>11</sup> 19 Tex. Admin. Code § 61.1000(g)(1).
  - <sup>12</sup> 19 Tex. Admin. Code § 61.1000(f).
  - <sup>13</sup> Tex. Educ. Code § 44.004. A district with a July 1 fiscal year must, after receipt of the certified appraisal roll, publish a revised notice and hold another public meeting before the district may adopt a tax rate that exceeds the proposed rate or the district’s voter-approval tax rate using the certified appraisal roll. Tex. Educ. Code § 44.004(i)(1)-(2).
  - <sup>14</sup> Tex. Educ. Agency, [FASRG](#), *Module 1, Financial Accounting and Reporting*, section 1.1.3, p. 13, and *Module 4, Auditing*, section 4.6.4, Exhibit 1, p. 59 (2022).
  - <sup>15</sup> Tex. Educ. Code § 44.004.
  - <sup>16</sup> Tex. Elec. Code § 3.005; Tex. Tax Code § 26.08. See TASB Legal Services’ eSource [Elections website](#) and the Secretary of State [Elections Division website](#) for more information regarding election procedures and deadlines.
  - <sup>17</sup> Tex. Educ. Agency, [FASRG](#), *Module 1, Financial Accounting and Reporting*, section 1.1.3, p. 13, and *Module 4, Auditing*, section 4.6.4, Exhibit 1, p. 59 (2022).
  - <sup>18</sup> 19 Tex. Admin. Code § 61.1000(e).
  - <sup>19</sup> Tex. Tax Code § 26.05(a).
  - <sup>20</sup> Tex. Educ. Code § 11.184(g).
  - <sup>21</sup> Tex. Educ. Code § 11.184(h).
  - <sup>22</sup> Tex. Tax Code § 26.08(a); Tex. Elec. Code § 41.001.

# Lockhart Independent School District Board of Trustees

Date of Board Meeting:

Agenda Item:

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AGENDA SECTION:

READING:

PREVIOUS BOARD REVIEW DATE:

TYPE OF ACTION:

DEPARTMENT:

## DISTRICT GOAL(S) ALIGNMENT:

1. Create innovative opportunities for ALL students to prepare for success beyond graduation.
2. Every campus will have an A rating by 2028 through exemplary teaching and student-centered learning.
3. Cultivate an environment where our employees choose Lockhart Independent School District.

AGENDA TITLE:

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BACKGROUND INFORMATION:

ATTACHMENT(S):

RECOMMENDATION:

RECOMMENDED MOTION:

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