

MEMORANDUM

TO: Wake County Board of Education Policy Committee
FROM: Ann Majestic
RE: Proposed Transparency Policy
DATE: September 20, 2012

Issue Presented

Research and identify local school district transparency policies with which to compare WCPSS' proposed "Transparency of Board and District Operations" policy. Attachment A.

Research Method

To complete this assignment, we utilized a number of strategies:

- Conducted online searches for text similar to the WCPSS proposed policy, school board communications policies, website policies, transparency policies, etc.
- Asked the N.C. School Boards Association to search their policy database for any examples of transparency policies.
- Asked Janine Murphy, assistant legal counsel at the N.C. School Boards Association, to post multiple inquiries to the American Association of State Policy Services electronic bulletin board.

Results/Analysis

A. Proposed WCPSS Transparency Policy

An online search revealed that the WCPSS proposed policy borrows a considerable amount of language from "The Transparency and Government Accountability Act" – a piece of model state legislation promulgated by the American Legislative Exchange Council (ALEC).

Attachment B. The ALEC legislation's stated purpose is to overcome the "bureaucratic 'slow

roll' and . . . inflated price tags for staff time and copying” by making many government documents available to the public for instant access. *Id.* In our research we were unable to find examples of any local board of education policies adopting this legislation.

B. Other Transparency/Communications Policies

Our research turned up only a few school board policies related to “transparency.” The first is a model policy crafted by the Illinois School Boards Association to help local Illinois school districts comply with the state’s Freedom of Information Act (“FOIA”), and it is very similar in scope to WCPSS’ proposed policy. Attachment C. The Illinois FOIA statute obligates the state’s public entities to make financial information, payrolls, arrest reports, settlement agreements, and other records available to the general public. 5 ILL. COMP. STAT. 140/2. The statute also requires each public entity to display on its website the means by which individuals can request public records, as well as:

[A] short summary of [the public entity’s] purpose, a block diagram giving its functional subdivisions, the total amount of its operating budget, the number and location of all of its separate offices, the approximate number of full and part-time employees, and the identification and membership of any board, commission, committee, or council which operates in an advisory capacity relative to the operation of the public body, or which exercises control over its policies or procedures, or to which the public body is required to report and be answerable for its operations[.]”

The second is a generic communications policy from an Illinois high school district. (Attachment D) The policy merely affirms the district’s broad pledge to keep its members informed of district programs, policies, and activities via “various communication tools” like “publications, websites, [and] face-to-face meetings,” and is very general compared to WCPSS’ proposed policy. *Id.*

We also located local board policies in Illinois (Attachments E, F and G) that address access to public records in various ways.

Finally, we found a Michigan Department of Education report providing guidance for budget and salary/compensation transparency (Attachment H).

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Attachment A

Policy #

Transparency of Board and District Operations

Policy #

The Wake County Public School System shall provide information in a readily accessible format to the public and will maintain an official, searchable website accessible to all citizens that affirmatively discloses all appropriate information as described below. The WCPSS website shall have any easy to understand interface and shall be well organized, searchable, and easy to navigate.

The WCPSS website shall post all open meetings laws; notices about public meetings, committees and boards; minutes of past meetings; schedules; and meeting agendas for future and past meetings.

The WCPSS website shall also include the following information:

A. Budget Information

1. All budgets, current and historic.
2. Graphs showing spending and revenue over time.
3. A check register including the amount of the payment, date, check number, to whom the payment was made (with address).
4. What the payment was for, expenditure category, fund source and links to relevant contracts.

B. Elected Officials Information

1. Contact Information, terms of office, conflict of interest rules, and committee appointments of board members.

C. Administrative Official Information

1. Easily searchable contact information for Central Office administrators and areas of oversight.

D. Ethics Information

1. Guidelines for ethical behavior of elected officials and WCPSS employees.
2. Process for reporting ethics violations.
3. Status of current investigations and results of investigations.

E. Audit Information

1. Status of regular audits of WCPSS and departments.
2. Audit results.
3. Schedule of all financial audits.
4. Performance audits for programs and an outline for ongoing policy and procedure audits.

F. Contract Information

1. Rules governing contracts.
2. Bids and contracts for purchases over \$2,500.

3. Vendor campaign contributions.
4. Vendor contact information

G. Lobbying Information

1. Disclosure of any WCPSS paid lobbying activity
2. Database of lobbyists
3. Agency lobbying contracts
4. All grants given to non-profit organizations
5. Reason for the grant
6. Contact information

H. Sunshine Law

1. Freedom of information contact for every department in one central location.
2. Department/agency freedom of information officer contact information posted on website homepage.
3. Annual compliance survey performed measuring the number of information requests submitted and fulfilled
4. Average time for compliance and reasons for denials.

I. Tax Information

1. Central location for all tax information; including fees and membership.
2. Full disclosure of all sources of revenue and gifts to the WCPSS.

Legal Ref.:

Adopted:

Attachment B

The Transparency and Government Accountability Act

Summary

“Transparency” is government’s obligation to share information with citizens that is needed to make informed decisions and hold officials accountable for the conduct of the people’s business.

Transparency exists on government websites largely at the munificence of officials. The burden of negotiating complex and costly Freedom of Information Act (FOIA) petitions rests squarely on the shoulders of citizens and journalists. Despite “sunshine” laws and much pro-transparency rhetoric, information requests by journalists and citizens are routinely ignored, given the bureaucratic “slow roll” and discouraged by inflated price tags for staff time and copying.

FOIAs and official goodwill are insufficient in securing citizens and journalists information they need and have a right to review.

Therefore, this act affirms that the government of the state of {insert state} has a duty to affirmatively disclose certain information, in a timely manner, and to shift the burden from citizens and journalists to the state, to share all information necessary, so that citizens may hold their elected officials accountable.

Legislation

THE PEOPLE OF THE STATE OF {insert state} DO ENACT AS FOLLOWS:

Section 1.

The State of {insert state} shall maintain an official, searchable website accessible to all citizens that affirmatively discloses all appropriate information as described in subsections (a through i). The state website shall use a consistent website domain and present all information in “plain English”. The state website shall have an easy-to-understand interface and shall be well organized, easy to navigate and without tedious plug-in downloads.

The state website shall post all open meetings laws, notices about public meetings, committees and boards, minutes of past meetings, a schedule, and meeting agendas for future and past meetings, and

(A) Budget information, including:

- (1) All budgets, current and historic

- (2) Graphs showing spending and revenue over time
- (3) A check register including:
 - (a) The amount of the payment
 - (b) Date
 - (c) Check number
 - (d) To whom the payment was made (including the address)
 - (e) What it was for
 - (f) Budgetary authority for the expenditure
 - (g) Functional expenditure category
 - (h) Sources of funds
 - (i) Links to the relevant contracts under which the payment was made

(B) Elected officials information, including:

- (1) Contact information for all elected officials
- (2) Terms of office and date of next election
- (3) Voting record
- (4) Party affiliation
- (5) Conflict of interest rules
- (6) Committee appointments

(C) Administrative official information, including:

- (1) Contact information for all appointed administrators
- (2) Terms of office
- (3) Governing boards and by laws for agencies

- (4) Party Affiliation
- (5) Conflict of interest rules

(D) Ethics information, including:

- (1) Ethics commission and guidelines for ethical behavior of state officials
- (2) Process for reporting ethics violations
- (3) Status of current investigations and results of investigations

(E) Audit information, including:

- (1) Status of regular audits of state agencies and departments, including the Governor and the Assembly
- (2) Audit results
- (3) Schedule of all financial audits
- (4) Performance audits for state programs

(D) Contract information, including:

- (1) Rules governing contracts
- (2) Bids and contracts for purchases over \$10,000
- (3) Vendor campaign contributions and the vendor contract

(E) Lobbying information, including:

- (1) Disclosure of state-paid lobbying activity
- (2) Database of registered lobbyists
- (3) Agency lobbying contracts
- (4) All grants given to non-profit organizations, reason for the grant and a contact in the organization responsible for oversight

(F) Freedom of Information Act (FOIA) information, including:

- (1) FOIA contact for every state agency/department in one central location

- (2) Department/Agency FOIA officer posted on Department homepage
- (3) Annual compliance survey performed measuring, number of FOIAs submitted, number fulfilled, average time for compliance and reasons for denials

(G) Tax information, including:

- (1) Central location for all tax information, including state "fees" such as drivers' licenses.
- (2) Agency disclosure of all sources of revenue

*Adopted by the Tax and Fiscal Policy Task Force at the Annual Meeting, August 7, 2010.
Approved by the ALEC Board of Directors, September 19, 2010.*

Attachment C

School Board

Exhibit - Immediately Available District Public Records and Web-Posted Reports and Records 1

[For use by only those Districts that have websites.]

The District’s Freedom of Information Officer designates the public records that are listed in this table as being immediately available to the public. The records that are asterisked are posted on the District’s website and may be immediately inspected, downloaded, printed, and/or copied. Any asterisked public record is also immediately available for inspection or copying upon request at the District’s administrative office during its regular business hours, provided any applicable fees are paid. Records without an asterisk will be provided within 5 business days as allowed by the Freedom of Information Act, provided any applicable fees are paid.

Web-posted records and information	Web-posting statutory reference and special instructions
<ul style="list-style-type: none"> *Annual schedule of regular meetings for the current school year that are posted at the beginning of each calendar or fiscal year *Public notice of each Board meeting that is posted at least 48 hours before the meeting and remains posted until the meeting is concluded *Agenda of each regular meeting that is posted at least 48 hours before a meeting and remains posted until the meeting is concluded 	<p>5 ILCS 120/2.02.</p>
<ul style="list-style-type: none"> *Official open meeting minutes that are posted within 10 days of the Board’s approval and remain posted for at least 60 days 	<p>5 ILCS 120/2.06(b), amended by P.A. 96-1473.</p>
<ul style="list-style-type: none"> *Description of the District and its records including: Summary of the District’s purpose Functional subdivisions Total amount of operating budget 	<p>5 ILCS 140/4, amended by P.A.96-542. The District must prominently post the list at each administrative office and make it available for inspection and</p>

1 This exhibit has two purposes: (1) to identify the data and documents that must be posted on a district’s website, and (2) to fulfill the requirement in the Freedom of Information Act (FOIA) for the district’s FOIA officer to designate the public records that are immediately available to the public (5 ILCS 140/3.5(a)). Many attorneys agree that using the required items for web-posting is an easy and practical way for the FOIA Officer to develop a list of public records that are *immediately available*. Some attorneys prefer that the district also retain copies of its web-posted public records for immediate inspection and/or copying upon request at the administrative office. The introductory paragraph manages this issue by indicating that copies of certain identified public records will also be immediately available in the district’s administrative office. This exhibit suggests identifying public records for immediate availability that are easily reproduced and stored, i.e., not voluminous. The FOIA Officer should customize this list as appropriate to the district’s circumstances.

Note, however, that simply referring a FOIA requester to a responsive document that is available on the district’s website is not a sufficient response and that a copy must be provided on request (see reference in Public Access Counselor binding opinion 2010-001). Consult the board attorney for ideas to manage the district’s specific FOIA compliance issues.

The “Intermediate Service Center” is given as an alternative to “Regional Superintendent” herein because 105 ILCS 5/2-3.62, abolished the Regional Office of Education for Suburban Cook County and transferred its powers and duties to Intermediate Service Centers.

Web-posted records and information	Web-posting statutory reference and special instructions
<p>Number and location of all of its separate offices</p> <p>Approximate number of full and part-time employees (see also, salary and benefits information report for the Superintendent, administrators, and teachers, District's Statement of Affairs)</p> <p>Identification and membership of the Board</p> <p>Brief description of the methods whereby the public may request information and public records</p> <p>Directory information for the Freedom of Information Officer</p> <p>Address where requests for public records should be directed</p> <p>Fees</p>	<p>copying.</p>
<p>Annual budget for current fiscal year, itemized by receipts and expenditures</p>	<p>105 ILCS 5/17-1.2.</p> <p>This may be accomplished using ISBE's School District Budget Form 50-36 or the summary pages from it. ²</p> <p>The District must notify the parents or guardians of its students that the budget has been web-posted and what the website's address is.</p>
<p>*District Report Card and a Report Card for each School (the Report Cards will be provided by ISBE by Oct. 31, 2013 and Oct. 31 of each subsequent school year)</p>	<p>105 ILCS 5/10-17a, amended by P.A. 97-671.</p> <p>Annually, no more than 30 calendar days after receiving the Report Cards from the State Superintendent, the District must: (1) present them at a regular Board meeting, (2) post them the District's website, (3) make them available to a newspaper of general circulation serving the District, and (4) upon request, send them home to parents/guardians.</p> <p>The District also must send a written notice home to parents/guardians stating: (1) that the Report Cards are available on the website, (2) the website's address, (3) that a printed copy will be sent upon request, and</p>

² For school officials that are concerned that some of their district's constituents may not have the proper software to access these documents, ISBE provides links to free *viewer* or *reader* products that support the ISBE School District Budget Form (50-36). These products can be downloaded and used to access the budget as posted on the district's website. See www.isbe.net/sfms/budget/freecviewer.htm.

Web-posted records and information	Web-posting statutory reference and special instructions
	(4) the telephone number to request a printed copy.
*A list of all contracts in excess of \$25,000 and any contracts with an exclusive bargaining representative.	105 ILCS 5/10-20.44. There is no statutory timeline for web-posting. Each year, in conjunction with the submission of the Statement of Affairs to ISBE, before Dec. 1, the District must submit to ISBE an annual report on all contracts over \$25,000 awarded during the previous fiscal year.
Annual Statement of Affairs	105 ILCS 5/10-17. The District is not required to web-post this document. It must, annually by Dec. 1, submit the Statement to ISBE for posting on ISBE's website, have copies of the Statement available in the main administrative office, and publish a summary of the Statement in a newspaper of general circulation published in the District.
*Administrator and Teacher Salary and Benefits Report (itemized salary report for the Superintendent and all administrators and teachers); <i>benefits</i> includes without limitation vacation days, sick days, bonuses, annuities, and retirement enhancements	105 ILCS 5/10-20.47, amended by P.A. 97-256. Annually on or before October 1: (1) the information must be presented at a regular Board meeting and posted on the District's website, and (2) after the Board meeting at which the information was presented, the Report must be provided to ISBE.
*As an employer that participates in the Illinois Municipal Retirement Fund (IMRF), a compensation report for employees who have a total compensation package that exceeds \$75,000 per year; <i>total compensation package</i> means salary, health insurance, a housing allowance, a vehicle allowance, a clothing allowance, bonuses, loans, vacation days granted, and sick days granted As of May 1, 2012, IASB has not received a response from the Ill. Attorney General's office to its request for guidance concerning whether this requirement applies to employees who do not	5 ILCS 120/7.3, added by P.A. 97-609. The report must be posted within 6 business days after the District approves a budget. The District may choose to post a physical copy of this information at its principal office in lieu of posting the information directly on the website in which case it must post directions on the website for accessing that information.

Web-posted records and information	Web-posting statutory reference and special instructions
participate in IMRF, e.g., TRS participants.	
<p>*As an employer that participates in the Illinois Municipal Retirement Fund, a compensation report for employees who have a total compensation package that is equal to or in excess of \$150,000 per year; <i>total compensation package</i> means payment by the employer to the employee for salary, health insurance, a housing allowance, a vehicle allowance, a clothing allowance, bonuses, loans, vacation days granted, and sick days granted</p> <p>As of May 1, 2012, IASB has not received a response from the Ill. Attorney General's office to its request for guidance concerning whether this requirement applies to employees who do not participate in IMRF, e.g., TRS participants.</p>	<p>5 ILCS 120/7.3, added by P.A. 97-609. The report must be posted at least 6 days before the District approves an employee's total compensation package that is equal to or in excess of \$150,000. The District may choose to post a physical copy of this information at its principal office in lieu of posting the information directly on the website in which case it must post directions on the website for accessing that information.</p>
<p>A description of activities to address intergroup conflict (an optional program authorized by Sec. 27-23.6)</p>	<p>105 ILCS 5/27-23.6(c).</p>
<p>*Log of Board Members' Training and Development Activities</p>	<p>105 ILCS 5/10-16a, added by P.A. 97-8. The District must post on its website the names of all Board members who have completed professional development leadership training (required for board members taking office after 6/13/2011).</p> <p>5 ILCS 120/1.05(b) and (c), amended by P.A. 97-504. Each Board member must complete training on the Open Meetings Act. After completing the training, each Board member must file a copy of their certificate of completion with the School Board.</p> <p>105 ILCS 5/24-16.5, added by P.A. 97-8. After the implementation of the Performance Evaluation Reform Act (PERA) evaluations, each Board member participating in PERA evaluations must complete a training program.</p>

Attachment D

School Board

Access to District Public Records

Full access to the District's *public records* is available to any person as provided in the Illinois Freedom of Information Act (FOIA), this policy, and implementing procedures.

Freedom of Information Officer

The Superintendent shall serve as the District's Freedom of Information Officer and assumes all the duties and powers of that office as provided in FOIA and this policy. The Superintendent may delegate these duties and powers to one or more designees, but the delegation shall not relieve the Superintendent of the responsibility for the action that was delegated. The Superintendent or designee(s) shall report any FOIA requests and the status of the District's response to the Board at each regular Board meeting.

Definition

The District's *public records* are defined as records, reports, forms, writings, letters, memoranda, books, papers, maps, photographs, microfilms, cards, tapes, recordings, electronic data processing records, electronic communications, recorded information and all other documentary materials pertaining to the transaction of public business, regardless of physical form or characteristics, having been prepared by or for, or having been or being used by, received by, in the possession of, or under the control of the School District.

Requesting Records

A request for inspection and/or copies of public records must be made in writing and may be submitted by personal delivery, mail, telefax, or email directed to the District's Freedom of Information Officer. Individuals making a request are not required to state a reason for the request other than to identify when the request is for a commercial purpose or when requesting a fee waiver. All requests for inspection and copying shall immediately be forwarded to the District's Freedom of Information Officer or designee.

Responding to Requests

The Freedom of Information Officer shall approve all requests for public records unless:

1. The requested material does not exist; The requested material is exempt from inspection and copying by the Freedom of Information Act; or
2. Complying with the request would be unduly burdensome.

Within 5 business days after receipt of a request for access to a public record, the Freedom of Information Officer shall comply with or deny the request, unless the time for response is extended as specified in Section 3 of FOIA. The Freedom of Information Officer may extend the time for a response for up to 5 business days from the original due date. If an extension is needed, the Freedom of Information Officer shall: (1) notify the person making the request of the reason for the extension, and (2) either inform the person of the date on which a response will be made, or agree with the person in writing on a compliance period. Notwithstanding the above, the Freedom of Information Officer shall respond to requests for *commercial purposes* and to *recurrent requesters* (as those terms are defined in Section 2 of FOIA) according to Sections 3.1 and 3.2 of FOIA. When responding to a

request for a record containing both exempt and non-exempt material, the Freedom of Information Officer shall redact exempt material from the record before complying with the request.

Copying Fees

Persons making a request for copies of public records must pay any applicable copying fee. The Freedom of Information Officer shall, as needed, recommend a copying fee schedule for the Board's approval. Copying fees, except when fixed by statute, are reasonably calculated to reimburse the District's actual cost for reproducing and certifying public records and for the use, by any person, of its equipment to copy records. No copying fee shall be charged for the first 50 pages of black and white, letter or legal sized copies. No copying fee shall be charged for electronic copies other than the actual cost of the recording medium.

Fees for Responding to a Request for a Commercial Purpose In addition to copying fees, persons making a request for a *commercial purpose*, as defined in FOIA, must pay a fee of \$10 for each hour spent by personnel in searching for and retrieving the record. However, no fees shall be charged for the first 8 hours spent by personnel in searching for or retrieving a requested record. The District also charges the actual cost of retrieving and transporting public records from an off-site storage facility when the public records are maintained by a third-party storage facility under contract with the District. Whenever the District charges any fees to a requester making a commercial request, the Freedom of Information Officer shall provide the requester with an accounting of all fees, costs, and personnel hours in connection with the request for public records.

Access

The inspection and copying of a public record that is the subject of an approved access request is permitted at the District's administrative office during regular business hours, unless other arrangements are made by the Freedom of Information Officer.

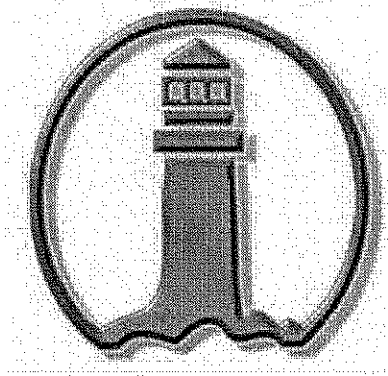
Many public records are immediately available from the District's website including, but not limited to, a description of the District and the methods for requesting a public record.

Preserving Public Records

Public records, including email messages, shall be preserved and cataloged if: (1) they are evidence of the District's organization, function, policies, procedures, or activities, (2) they contain informational data appropriate for preservation, (3) their retention is required by State or federal law, or (4) they are subject to a retention request by the Board Attorney (e.g. a litigation hold), District auditor, or other individual authorized by the School Board or State or federal law to make such a request. Unless its retention is required as described in items numbered 3 or 4 above, a public record, as defined by the Illinois Local Records Act, may be destroyed when authorized by the Local Records Commission.

Attachment E

Evanston/Skokie CC School District 65
1500 McDaniel Avenue, Evanston, IL 60201



Description of the District and its records prepared
in compliance with 5 ILCS 140/4, amended by P.A.
96-542.

For more information,
contact Pat Markham,
Freedom of Information Act Officer
at 847 859-8067
or via email at markhamp@district65.net

Last updated 12/11

In compliance with 5 ILCS 140/4, the following is a description of the district and its records:

Evanston/Skokie CC School District 65 is a K-8 school district serving more than 7,000 students of families residing in the City of Evanston and a small neighboring section of the Village of Skokie, Illinois.

Administrative Services

Administrative services, early childhood education, and programs and services for District 65 families are available at the Joseph E. Hill Education Center, 1500 McDaniel Avenue in Evanston.

Educational Programs and Services

Elementary and middle school educational services and programs are offered at school sites located within the Evanston/Skokie District 65 community. A complete listing of school sites and centers is available on the web at <http://www.district65.net/Schools>.

Budget

The total operating budget and information about the district's employees are available on the district website at <http://www.district65.net/departments/businessoffice/Financial>.

Governing Board

District 65 is governed by a locally-elected, seven-member board. School board members serve, uncompensated, for four-year terms. Members are elected at-large during the Consolidated Election on the first Tuesday in April of each odd-numbered year. (If that date conflicts with Passover, the election moves to the second Tuesday.) Terms of members are staggered so that there are three or four seats contested at each biennial election. Contact information for individual board members is available on the Board of Ed web page at <http://www.district65.net/boardofed/>.

Freedom of Information Officer

In compliance with the Illinois Freedom of Information Act, the district's school board secretary is the designed Freedom of Information Officer. Requests for public records should be directed to the Office of the School Board Secretary c/o of the Joseph E. Hill Education Center at 1500 McDaniel Avenue, Evanston, Illinois 60201. A Request for Information Form is available on the Communications Department web page (<http://www.district65.net/departments/communications/>) or requests may be sent by fax to 847 859-8770 or email to markhamp@district65.net Pursuant to the Illinois Freedom of Information Act, the following categories of public records of the Evanston/Skokie CC School District 65 are available for public inspection:

- Administrative materials and procedural rules;
- Final opinions and determinations, except for those adjudicating student disciplinary cases where the disclosure would unavoidably reveal the identity of the student, or those adjudicating employee grievances or disciplinary cases;
- Final outcomes of employee grievances or disciplinary cases in which discipline is imposed;
- Board of Education policies and final documents explaining or interpreting such policies;
- Final reports and studies prepared by or for the District;
- Information concerning expenditure of public funds, unless otherwise exempt from disclosure under FOIA;
- Names, salaries, titles, and dates of employment for all District employees and officers;
- Minutes of Board of Education meetings open to the public;
- Information concerning grants or contracts made by the District, unless otherwise exempt from disclosure under FOIA;
- All other information required by law to be made available for public inspection and copying.

*Evanston/Skokie CC School District 65
1500 McDaniel Avenue
Evanston, IL 60201*

Fee Schedule for Document Production

Paper Copies

Pursuant to the terms of Illinois Freedom of Information Act, the first 50 pages of black and white letter or legal sized copies are provided to the requestor free-of-charge.

Additional letter or legal size pages (black and white or color copies) are provided at a cost of \$.15/page.

Actual reproduction costs will be charged for copies of oversized records.

Electronic Media

Pursuant to the terms of Illinois Freedom of Information Act, the cost of electronic materials, e.g., disks, flash drive, or other electronic medium will be assessed when electronic records are reproduced on these electronic devices.

Record Certification

As allowed by the terms of Illinois Freedom of Information Act, a fee of \$1 will be assessed for certifying a record.

Fee Waiver

Pursuant to the terms of Illinois Freedom of Information Act, any requests to waive fees for document reproduction shall be sent, in writing, to the Freedom of Information Officer.

Following is a list of immediately available public records

The following public records are designated as being immediately available on the District 65 website and may be inspected, downloaded, printed, and/or copied.

Any public record marked with an asterisk is immediately available for inspection or copying upon request at the District's administrative office during its regular business hours, provided any applicable fees are paid. Records without an asterisk will be provided within five (5) business days as allowed by the Freedom of Information Act, provided any applicable fees are paid.

Immediately available Public Records
<p>*Annual schedule of regular meetings for the current school year that are posted at the beginning of each calendar or fiscal year</p> <p>*Public notice of each board meeting that is posted at least 48 hours before the meeting and remains posted until the meeting is concluded</p> <p>*Agenda of each regular meeting that is posted at least 48 hours before a meeting and remains posted until the meet is concluded.</p> <p>*Adopted Board of Education policies.</p>
<p>*Official open meeting minutes that are posted within 7 days of the Board's approval and remain posted for at least 60 days</p>
<p>*Description of the District and its records, including:</p> <ul style="list-style-type: none"> • Summary of the District's purpose • Functional subdivisions • Total amount of operating budget • Number and location of all of its separate offices • Approximate number of full and part-time employees (see also, salary and benefits information report for the Superintendent, administrators, and teachers, District's Statement of Affairs) • Identification and membership of the Board • Brief description of the methods whereby the public may request information and public records • Directory for the Freedom of Information Officer • Address where requests for public records should be directed • Fees
<p>Annual budget for current fiscal year, itemized by receipts and expenditures</p>
<p>*District's current report card (ISBE School Report Card Data Form 86-43)</p>
<p>Administrator Salary Compensation Report (itemized salary compensation report for every employee holding an administrative certificate and working in that capacity, including the Superintendent). For each District administrator:</p> <ul style="list-style-type: none"> • Base salary • Bonuses • Pension contributions • Retirement Increases • Cost of health insurance • Cost of life insurance • Paid sick and vacation day payouts • Annuities • Other forms of compensation or income paid on behalf of the employee, e.g., travel and business expense reimbursements, non-base compensation such as use of a District vehicle, wellness incentives, gym memberships, etc.
<p>Current contracts with an exclusive bargaining representative(s).</p>
<p>A listing of all contracts over \$25,000 for the current fiscal year.</p>

Evanston/Skokie
School District 65
www.district65.net
Forward to Excellence

1500 McDaniel Avenue
Evanston, IL 60201-3976
847 859-8067 (Voice/TDD)
847 859-8770 (Fax)

Request for District Records Form

Requests to inspect and/or obtain a copy of District records should be directed to the District's Freedom of Information Act Officer, Patricia Markham, via email to markhamp@district65.net, via fax to 847 859-8770 or sent in c/o Joseph E. Hill Education Center, 1500 McDaniel Avenue, Evanston, IL. Requests must be written and may be submitted on this form, via email or made in person. Records subject to inspection and/or copying will be prepared for inspection or copying within the time allowed by Illinois Freedom of Information Act.

Name of Individual Requesting District Records

Organization

Address

Telephone Number

City/State/Zip

Date of Request

Request is for commercial purposes

Please list the public record(s) requested _____

NOTE: Unless otherwise indicated, records will be sent by U.S. Mail

The first 50 printed pages of black and white copies are free. Additional pages will be provided at a cost of .15 per page. Digital media will be provided "at cost."

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***For internal use:*** Received this \_\_\_\_ day of \_\_\_\_\_, 20\_\_ Due: \_\_\_\_\_

If records are to be denied, enter date sent to Public Access Counselor \_\_\_\_\_ Response Received \_\_\_\_\_

Response completed: \_\_\_\_\_  
*date* *signature*

# Attachment F

**BOARD POLICY: COMMUNICATIONS**

9300

Page 1 of 2 pages

Section A - Introduction

The Board of Education believes it is its responsibility, as well as that of each employee, to engage in effective communications in an effort to strengthen the educational experiences of our school community, as well as to keep the taxpayers of District 225 informed of the actions, activities, achievements and status of the District.

Section B - Connection with the Community

The superintendent is the District's chief spokesperson and is directed by the Board of Education to plan and implement a District public relations (PR) and communications program that will build knowledge of the District, activities and finances, and support among students, parents, staff and the school community and community at large, by:

1. Promoting an understanding of district initiatives, policies, operations, finances, programs, services, and the educational organization as a whole.
2. Providing accurate, timely and transparent communication.
3. Providing news media with timely and accurate information.
4. Adhering to a policy of openness, honesty, integrity and ethics in communicating with all stakeholders
5. Providing opportunities for public engagement.
6. Establishing effective two-way communication systems that strengthen relationships.
7. Gathering community input regarding the District.
8. Demonstrating the benefits of district schools.
9. Helping the community feel a more direct responsibility for, and understand the benefits of, the quality of education provided by their schools.
10. Promoting a genuine spirit of cooperation between the school and the community.

Section C – Strategies

The public relations and communications program may include:

1. Regular news releases concerning District programs, policies, and activities, that will be sent to the news media.
2. News conferences and interviews, as requested or needed. Individuals may speak for the District only with prior approval from the superintendent.
3. The utilization of various communication tools (i.e. publications, websites, face-to-face meetings) to inform the community of major district programs, services, achievements, initiatives, finances, policies, actions, etc.
4. Publications having a high quality of editorial content and effective format. All publications shall identify the District, school, department, or classroom and shall include the name of the superintendent, the building principal, and/or the author and the publication date.
5. Other efforts that highlight the District's programs and activities.
6. A commitment to engaging and responding to media requests.
7. Informal and formal research gathering to assess the public's knowledge and attitudes about the District.
8. Staff development and training in communication skills and strategies.
9. Evaluation of communication strategies and adjustments as needed.

Approved: September 12, 2011

# Attachment G



# Glenbard District 87

Where Excellence is Tradition

586 Crescent Boulevard Glen Ellyn, IL 60137 Phone: (630) 484-9100

Home About Us Community Parents/Students School Board Staff

Quick Links

- Online Payments
- PowerSchool Login
- Employment
- Photo Gallery
- Events Calendar
- District Calendar

## Glenbard Township High School District 87 Policy 2:250-E2

### Board of Education

#### Exhibit – Immediately Available Public Records

Select Language

Powered by Google Translate

School Board Policies:

- 00-Policy Manual Index
- 01-School District Organization
- 02-Board of Education
- 03-General School Administration
- 04-Operational Services
- 05-General Personnel
- 06-Instruction
- 07-Students
- 08-Community Relations
- District Bylaws
- Search



| Web-posted records and information                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Web-posting statutory reference and special instructions                                                                                                                                                                                                                 |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| *Annual schedule of regular meetings for the current school year that are posted at the beginning of each calendar or fiscal year                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | 5 ILCS 120/2.02.                                                                                                                                                                                                                                                         |
| *Public notice of each Board meeting that is posted at least 48 hours before the meeting and remains posted until the meeting is concluded                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                                                                                                                          |
| *Agenda of each regular meeting that is posted at least 48 hours before a meeting and remains posted until the meeting is concluded                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                          |
| *Official open meeting minutes that are posted within 10 days of the Board's approval and remain posted for at least 60 days                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 5 ILCS 120/2.06(b) amended by P.A. 96-1473 (eff. 1-1-2011).                                                                                                                                                                                                              |
| *Description of the District and its records including:<br><br>Summary of the District's purpose<br><br>Functional subdivisions<br><br>Total amount of operating budget<br><br>Number and location of all of its separate offices<br><br>Approximate number of full and part-time employees (see also, salary and benefits information report for the Superintendent, administrators, and teachers, District's Statement of Affairs)<br><br>Identification and membership of the Board Brief description of the methods whereby the public may request information and public records<br><br>Directory for the Freedom of Information Officer<br><br>Address where requests for public records should be directed<br><br>Fees                                 | 5 ILCS 140/4, amended by P.A.96-542.<br><br>The District must prominently post the list at each administrative office and make it available for inspection and copying.                                                                                                  |
| Annual budget for current fiscal year, itemized by receipts and expenditures                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 105 ILCS 5/17-1.2. This may be accomplished using ISBE's School District Budget Form 50-36 or the summary pages from it.<br><br>The District must notify the parents or guardians of its students that the budget has been web-posted and what the website's address is. |
| *District's current report card (ISBE School Report Card Data Form 86-43)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 105 ILCS 5/10-17a.                                                                                                                                                                                                                                                       |
| Administrator Salary Compensation Report (itemized salary compensation report for every employee holding an administrative certificate and working in that capacity, including the Superintendent). For each District administrator:<br><br><ul style="list-style-type: none"> <li>• Base Salary</li> <li>• Bonuses</li> <li>• Pension contributions</li> <li>• Retirement increases</li> <li>• Cost of health insurance</li> <li>• Cost of life insurance</li> <li>• Paid sick and vacation day payouts</li> <li>• Annuities</li> <li>• Other forms of compensation or income paid on behalf of the employee; e.g., travel and business expense reimbursements, non-base compensation such as use of a District vehicle, wellness incentives, gym</li> </ul> | 105 ILCS 5/10-20.50, added by P.A.96-434 and renumbered by P.A. 96-1000.<br><br>The report must also be presented at a regular Board meeting and provided to the Regional Superintendent on or before October 1 of each year.                                            |
| Current contracts with an exclusive bargaining representative(s)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | 105 ILCS 5/10-20.46, added by P.A.96-434.                                                                                                                                                                                                                                |
| A listing of all contracts over \$25,000 for the current fiscal year.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | 105 ILCS 5/10-20.44.                                                                                                                                                                                                                                                     |
| The report made to ISBE on the total number and value of all such contracts broken down by category of awardee.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | After the initial web-posting, contracts should be added to the list as they are awarded by the Board.                                                                                                                                                                   |



REVIEWED: January 11, 2010

ADOPTED: February 22, 2010

REVIEWED: April 11, 2011

REVISED: April 25, 2011

Glenbard Township High Schools District #87 | Glen Ellyn, IL 60137 | Phone: (630) 469-9100 Fax: (630) 469-9107

# Attachment H

**MICHIGAN DEPARTMENT OF EDUCATION (MDE)**  
**GUIDANCE FOR BUDGET AND SALARY/COMPENSATION TRANSPARENCY**  
**REPORTS**  
**Revised March 23, 2012**

STATUTORY REQUIREMENT:

MCL 388.1618 Subsections 2 and 3

(2) Within 30 days after a board adopts its annual operating budget for the following school fiscal year, or after a board adopts a subsequent revision to that budget, the district shall make all of the following available through a link on its website home page, or may make the information available through a link on its intermediate district's website home page, in a form and manner prescribed by the department:

(a) The annual operating budget and subsequent budget revisions.

(b) Using data that have already been collected and submitted to the department, a summary of district expenditures for the most recent fiscal year for which they are available, expressed in the following two (2) pie charts:

(i) A chart of personnel expenditures, broken into the following subcategories:

(A) Salaries and wages.

(B) Employee benefit costs, including, but not limited to, medical, dental, vision, life, disability, and long-term care benefits.

(C) Retirement benefit costs.

(D) All other personnel costs.

(ii) A chart of all district expenditures, broken into the following subcategories:

(A) Instruction.

(B) Support services.

(C) Business and administration.

(D) Operations and maintenance.

(c) Links to all of the following:

(i) The current collective bargaining agreement for each bargaining unit.

(ii) Each health care benefits plan, including, but not limited to, medical, dental, vision, disability, long-term care, or any other type of benefits that would constitute health care services, offered to any bargaining unit or employee in the district.

(iii) The audit report of the audit conducted under subsection (3) for the most recent fiscal year for which it is available.

**(iv) Bids required under section 5 of the public employee health benefits act, 2007 PA 106, MCL 124.75.**

(d) The total salary and a description and cost of each fringe benefit included in the compensation package for the superintendent of the district and for each employee of the district whose salary exceeds \$100,000.00 (NOTE: THE TOTAL COMPENSATION PACKAGE MUST BE FULLY DISCLOSED).

(e) The annual amount spent on dues paid to associations.

(f) The annual amount spent on lobbying or lobbying services. As used in this subdivision, "lobbying" means that term as defined in section 5 of 1978 PA 472, MCL 4.415.

(3) For the information required under subsection 2a, 2bi, and 2c; an intermediate district shall provide the same information in the same manner as required for a district under subsection (2)

**For compliance with the Best Financial Practice Incentive Funds Requirement (e), the district must comply with the following:**

**MCL 388.1622f(1)(e)**

**The district provides to parents and community members a dashboard or report card demonstrating the district's efforts to manage its finances responsibly. The dashboard or report card shall include at least all of the following for the 3 most recent school years for which the data are available:**

- (i) Graduation and dropout rates.**
- (ii) Average class size in grades kindergarten to 3.**
- (iii) College readiness as measured by Michigan merit examination test scores.**
- (iv) Elementary and middle school MEAP scores.**
- (v) Teacher, principal, and superintendent salary information including at least minimum, average, and maximum pay levels.**
- (vi) General fund balance.**
- (vii) The total number of days of instruction provided.**

**GUIDANCE:**

The intent of this Budget and Salary/Compensation Transparency guidance is to:

- 1) Provide the required form and manner for the data to be reported,
- 2) Clarify the timeline for reporting the data, and
- 3) Clarify the titles, headings, and relevant data to be included in the reports.

The legislation requires that districts publish the following data through a link on the district's **Main Home Page**. If a district doesn't have a website, it must either develop one or work with its intermediate school district to report it on the ISD web page. The link should be titled "**Budget and Salary/Compensation Transparency Reporting**." For statewide consistency and public visibility, districts must use the icon badge provided by the Michigan Department of Education. This standard icon may be found at the following url:

[http://www.michigan.gov/documents/mde/Archive\\_2\\_312624\\_7.zip](http://www.michigan.gov/documents/mde/Archive_2_312624_7.zip)

It must appear on the top half of each district's homepage. The size of the icon may be reduced to 150 x 150 pixels.

- a) On the "**Budget and Salary/Compensation Transparency Reporting**" page, include a heading titled "**Fiscal Year 20xx-20xx Board Approved Budget**." The current year board approved budget should be posted under this heading for the district's fiscal year 2010-11 and following. The minimum level of detail (and standard account codes) for a district budget are defined in Section IV of the *Michigan Public School Accounting Manual*, subsection B.01. Budgets are to be posted to the website within 30 days of the date the original budget is adopted by the local school board. The web page must be

updated within 30 days of any subsequent board adopted revision to the budget. The district should, at a minimum, maintain the current year budgets on the website. At the end of any given fiscal year, there will most likely be two fiscal year budgets on the website; the budgets for the current year and the budgets that begin in the subsequent year. *Per the revised State Aid language, intermediate school districts must provide this data.*

bi) On the "**Budget and Salary/Compensation Transparency Reporting**" page, include a heading titled "**Personnel Expenditures.**" It will include data that have already been collected and submitted to the Department via the Financial Information Database (FID). *Per the revised State Aid language, intermediate school districts must provide this data.* This pie chart should be updated with the most recently submitted FID data within 30 days of the date of FID submission, no later than December 15<sup>th</sup> each year. The FID application includes a reporting option to create this pie chart. Guidance for obtaining the reports to meet this requirement is available through the Center for Performance and Information (CEPI) FID User Guide. The pie charts contain previous year FID data broken into the following subcategories as defined in the *Michigan Public School Accounting Manual*:

1. Salaries (object code 1xxx)
2. Employee Insurance Benefits (Object Codes 21xx)
3. FICA/Retirement/Unemployment/Workers Compensation) (Object Codes 28xx)
- 4) Other Employee Benefits (Object Codes 22xx, 23xx, 24xx, 29xx)

bii) On the "**Budget and Salary/Compensation Transparency Reporting**" page include a heading titled "**Current Operating Expenditures**" It will include data that have already been collected and submitted to the Department via the Financial Information Database (FID). *Per the revised State Aid language, intermediate school districts must provide this data.* This pie chart should be updated with the most recently submitted FID data within 30 days of the date of FID submission, no later than December 15<sup>th</sup> each year. The FID application includes a reporting option to create this pie chart. Guidance for obtaining the reports to meet this requirement is available through the Center for Performance and Information (CEPI) FID User Guide. The pie charts contain previous year FID data broken into the following subcategories as defined in the *Michigan Public School Accounting Manual*:

1. Classroom Instruction (Function 1xx)
2. Pupil and Instructional Staff Support (Functions 21x and 22x)
3. Business and Administration (Functions 23x, 24x, 25x, and 28x)
4. Operations, Maintenance and Facilities (Function 26x and 45x)
5. Transportation (Function 27x)
6. Other Support (29x)

Also on the "**Budget and Salary/Compensation Transparency Reporting**" page include headings for each of the following:

ci) "**Current Bargaining Agreements**"- Under this heading, provide a copy of the current bargaining agreement for each of the district's bargaining units (e.g. a pdf file). *Per the revised State Aid language, intermediate school districts*

*must provide this data.* This item should be updated on the website within 30 days of any changes made to the agreement.

cii) "**Employer Sponsored Health Care Plans**" - Under this heading, provide a copy of the plan detailing the current terms of all employee medical, dental, vision, disability, long-term care, or any other type of employee benefits that would constitute health care services offered to the district bargaining units or individual employees of the district (e.g. a pdf file or a link to the insurance provider's website containing the plan summary document.) *Per the revised State Aid language, intermediate school districts must provide this data.* This item should be updated on the website within 30 days of any changes made to the health care plans.

ciii) "**Audited Financial Statements**" Under this heading, provide a copy of the audited financial statement reports for the most recent fiscal year for which they are available. Alternatively, the district may choose to provide the information via a link to the MDE Office of Audit website containing the audits of all Michigan public school districts. *Per the revised State Aid language, intermediate school districts must provide this data.* The audit should be updated with the most recent fiscal year audit within 30 days of the date it was submitted to MDE, no later than December 15<sup>th</sup> each year.

civ) "**Bids required under section 5 of the public employee health benefits act, 2007 PA 106, MCL 124.75.**" Under this heading, provide copies of the "four or more" latest bids solicited for medical benefit plans as required in MCL 124.75. *Per the revised State Aid language, intermediate school districts must provide this data.*

d) "**Employee Compensation Information**" - Under this heading, provide a report of the total salary and a description and cost of each and every fringe benefit included in the compensation package for the superintendent of the district and for each employee of the district whose salary exceeds \$100,000 (e.g. a pdf file). For purposes of this reporting, salary will be defined similar to that reported as Medicare wages on the employee's prior year W2. This data must be all inclusive and should be data from the most recently completed year for which they are available. This item should be updated on the website within 30 days of the date the prior year W2 is issued to the employees.

e) "**District Paid Association Dues**" - Under this heading, provide a report that includes the annual amount paid by the district for association dues on behalf of the district or its staff (e.g. a pdf file). This should be data from the most recently completed fiscal year for which they are available. The report should include a listing of dues paid to each individual association at both the federal and state levels. This report should be updated within 30 days of the date of FID submission, no later than December 15<sup>th</sup> each year.

f) "**District Paid Lobbying Costs**" - Under this heading, provide a report that includes the annual amount the district paid for lobbying or lobbying services (e.g. a pdf file). This should be data from the most recently completed fiscal year for which they are available. Per MCL 4.415 "Lobbying" means communicating directly with an official in the executive branch of state government or an official in the legislative branch of state government for the purpose of influencing legislative or administrative action. Lobbying does not include the providing of technical information by a person other than a person as

defined in subsection (5) or an employee of a person as defined in subsection (5) when appearing before an officially convened legislative committee or executive department hearing panel. As used in this subsection, "technical information" means empirically verifiable data provided by a person recognized as an expert in the subject area to which the information provided is related. Subsection (5) "Lobbyist Agent" means a person who receives compensation or reimbursement of actual expenses, or both, in a combined amount in excess of \$250.00 in any 12-month period for lobbying. This report should be updated within 30 days of the date of FID submission, no later than December 15<sup>th</sup> each year.

**Best Financial Practice Incentive Payment Requirement E (Dashboard)- According to the MDE Best Financial Practice Guidance, districts wishing to meet the dashboard requirement under MCL 388.1622f(1)(e) may comply by providing a link to the Mi School Data portal under the district's Budget Transparency Icon. The url to this portal is: <https://www.mischooldata.org/>**

The font size and style for this reporting must be consistent with other documents on your website.

To be in compliance with this law, all data elements defined in the statute must be available on the district's Main Home Page in a form and manner defined in this guidance within 30 days after the board or intermediate board has adopted its 2011-12 annual school operating budget, or not later than July 30, 2011.