



Minutes of the Board of Directors
June 16, 2025

The meeting was convened by Bill Harris at 4:11 p.m. at Avondale Meadows Middle School. The following were present:

Board:

Jake Crouch	Marielle Rujevcan – Phone
Bill Harris	Ross Ridge - Phone
Sarah Lofton – Phone	Jetta Vaughn
Abby McDonough	

Votes were taken by verbal role call for each topic requiring a vote. All Motions were carried unanimously.

Staff/Others:

Darius Adamson, Executive Director	Aunye Hockett, Principal, AMA - Phone
Kelly Herron, Executive Director Consultant - phone	Bilen Mulugeta, VAR-MS
Janie Seivers, Director of Business Affairs	Ciara Jones, Principal, AMMS
Kristen Stratton, Director of Student Services	Alycia Villecco, VAR-EL
	Tammy Chaney – Milestone Accounting - phone

Public Comments:

Connect To Purpose:

- Mr. Adamson introduced Ciara Jones as the new AMMS Principal.
- Alycia Villecco, VAR-EL Principal, share the excitement and activities of the final Parent University. 20+ community partners and 100+ families attended. The event focused on enrollment for 2025-26.

Approval of Minutes

The March 31, 2025 board meeting minutes were presented.

MOTION: Approve the March 31, 2025 minutes as presented.

Jacob Crouch made the motion, Abby McDonough seconded. Motion carried.

Development Committee:

- The Development committee is seeking ideas for the FY26 fundraising event.
- We have been award Phase 2 of the Lilly Endowment grant for a total of \$456k. Now we are applying for Phase 3 which is competitive. We should hear results by December which could provide \$3M+.



2025 Building Minds...Changing Lives Celebration Reception Event Recap

Summary

166 guests attended the 2025 *Building Minds...Changing Lives* gala at Avondale Meadows Academy on May 1, 2025. Total revenue from the event was \$95,200. (In addition: two pledges were made totaling \$6,000 that have not yet been paid. Including these pledge increases the total revenue to \$101,200.) Total Expenses from the event was \$30,429.63. Catering expenses amounted to \$87 per person. The net amount raised (including the two pledges) is \$70,770.37. (Note: The detailed budget below does not include the two new pledges.)

The following is a detailed budget for the event. Following the budget is a year by year comparison of event results.

Event Budget

FUNDRAISING EVENT DETAILS		
Revenue Sources	TOTAL	Notes
Event Sponsor	\$15,000	Zink Family and Bondry Consultants
Classroom Sponsors	\$15,000	Various
Ticket Sales	\$900	
Table Sales	\$10,500	
Fund-A-Need	\$62,600	40 donors
Matching Gifts	\$1,200	4 - Regions Bank and 1 - Assured Partners
Total Revenue	\$105,200	
Event Expenses		
Event Expenses	Amount	Notes
Printing & Design	\$1,616	Elite
Mailing & Postage	\$500	US Mail
Contract Labor & Professional Services	\$1,980	Gary Meeks
Catering	\$13,464.83	\$87 Per Person
Beverage	\$902.35	Khan's
Bartending	\$600	MidWest Bartending
Photography	\$300	Tim Austin
Flowers & Plants	\$2,260	EngleDow
Rentals: Table Cloth/Silverware/plates	\$4,344.91	AClassic Rentals
Security	\$1,000	Local Police
Parking Attendants	\$1,300	GoldStar
Gifts/Prizes	\$83.37	Flowers for Jetta
Auctioneer	\$1,000	Darin Lawson
Supplies & Other	\$823.17	Various Items
Permit	\$50	Required by State
Trophies and Awards	\$205	Crown Trophy
Total Expenses	\$30,429.63	\$183.31 Per Person (166 guests)

Event Net **\$74,770.37**

	2025	2024	2023	2022	2021	2019
Revenue	\$105,200	\$100,750	\$97,225	\$86,250	\$72,500	\$76,250
Expenses	\$30,429.63	\$29,355.74	\$35,171	\$31,150	\$19,500	\$20,138
Net	\$74,770.37	\$71,355.26	\$62,054	\$55,150	\$53,000	\$56,111.85



Finance Committee Brief:

UNITED SCHOOLS OF INDIANAPOLIS
Financial Statement Summary
For Period Ending April 30, 2025

Cash on Hand:	3,883,861	Days Cash on Hand	
Investments:	152,083	All Funds	Unrestricted
Total Funds Available:	4,035,944	(OEI)	(Bond)
Restricted net of OEI/Vital:	430,950	AMA:	125
Unrestricted	3,604,994	VAR:	129
		AMMS:	129
		USI:	80
		Consolidated:	122
			89
Outstanding Receivables:	374,927	Debt Service Coverage projection:	
Outstanding Payables:	222,986	Budgeted for 6/30/25:	1.33
		Projected for 6/30/25:	1.44
		Required:	1.10
Net Operating Income:			
Avondale Meadows	439,086	Budgeted:	311,620
Vision Academy	388,748	Budgeted:	351,648
Avondale Meadows MS	228,233	Budgeted:	129,051
USI	(22,060)	Budgeted:	46,821
Consolidated	1,034,007		839,139

REVENUE:

EVIDENCE:

- Overall Revenue: under budget by \$227k
- Private Funding: over budget by \$45k
- Federal Funding: under budget by \$98k
- State Funding: under budget by \$310k
- Overall Net Income (Loss) is \$534k and under budget by \$305k; however, \$500k of expenses were paid from VITAL Gift Trust. **Overall Net Income excluding VITAL Gift expenses is \$195k over budget**

EXPENSES:

- Overall expenses are \$79k over budget; however, \$500k of expenses were paid from VITAL Gift Trust.

CASH TRANSFERS:

09/30/2024 - Cash transfer of \$50k was made from AMMS to VAR to align DCOH by location
12/31/2024 - Fund 0900 is no longer valid - cash was transferred to Fund 0101
12/31/2024 - Cash transfer of \$100k was made from AMA, AMMS and VAR to USI
03/31/2025 - Cash transfer of \$50k was made from AMMS to USI to align DCOH by location
03/31/2025 - Cash transfer of \$25k was made from AMA to USI to align DCOH by location

MOTION: Motion to approve the April, 2025 Financials, as presented.

Jacob Crouch made the motion. Ross Ridge seconded. Motion carried.

- Greenwalt CPA's merged with Barnes Dennig CPA firm who provided the FY25 audit engagement letter for approval.

MOTION: Motion to approve the FY25 Audit Engagement with Barnes Dennig, as presented.

Jake Crouch made the motion. Bill Harris seconded. Motion carried.

- The FY26 budget was presented and discussed. For the first time we are planning for a potential loss. The board agreed it is better to use reserved funds than to cut positions. We anticipate additional funding opportunities throughout the year to lessen the loss. The Finance Team also noted that many schools are experiencing the same financial issues as a result of ESSER funding coming to an end.

MOTION: Motion to approve the FY26 Budget, as presented.

lake Crouch made the motion. Boss Ridge seconded. Motion carried.



Governance Committee Brief:

- 2025-26 Slate of Officers - Officers are elected for 2 year terms
 - Bill Harris – Chair
 - TBD - Vice Chair
 - Abby McDonough – Treasurer
 - Sarah Lofton – Secretary
 - Committee Chairs – Committee chairs are appointed
 - Ross Ridge – Academic Committee Chair
 - Jake Crouch – Governance Committee Chair
 - Abby McDonough – Finance Committee Chair
 - Jetta Vaughn - Development Committee Chair
- Recognition of Service Resolution – Aaron Williams
 - Aaron served on the USI board from 2019 – 2025
- 2025-26 Meeting Schedule
 - Monday, July 28, 2025 @ 4pm - Vision
 - Monday, September 29, 2025 @ 4pm - Avondale
 - Monday, November 17, 2025 @ 4pm - Vision
 - Monday, January 26, 2026 @ 4pm – Avondale
 - Monday, March 30, 2026 @ 4pm – Vision
 - Monday, June 8, 2026 @ 4pm – Avondale
- Policy Approvals
 - Fringe Benefits Policy

MOTION: Motion to adopt the Fringe Benefits Policy, as presented.

Abby McDonough made the motion. Jetta Vaughn seconded. Motion carried.

- Recycle Disposal Policy

MOTION: Motion to adopt the Recycle Disposal Policy, as presented.

Abby McDonough made the motion. Jetta Vaughn seconded. Motion carried.

- PTO Accrual Policy

MOTION: Motion to adopt the PTO Accrual Policy, as presented.

Abby McDonough made the motion. Jetta Vaughn seconded. Motion carried.

- Board accountability and assessment reports will be distributed to each board member for completion



Academic Committee:

School Dashboards

Principal Highs and Lows
<u>AMA</u> High: K-2 Math proficiency exceeded goal of 35%, ILEARN growth toward goal Low: Attendance and Tardies will be a continued focus
<u>AMMS</u> High: Support systems in place are showing continued growth Low: Grow towards proficiency not simply growth
<u>VAR-EL</u> High: Growth in math proficiency; school culture is good, suspension rate is seeing improvement Low: Attendance and tardies is a continued focus
<u>VAR-MS</u> High: Met growth goal in spite of ongoing staffing challenges, fewer student removals from class, attendance! Low: Staffing challenges

Meeting adjourned at 5:02 pm.

ATTEST: Sarah P. Lofton 08/11/2025
Sarah Lofton, Secretary Date

USI FY 26 Budget Overview

Overview of Budget Proposal

- **Deficit budgeting** is being proposed for FY26.
- This will require using **cash reserves** to manage the shortfall.

Why Deficit Budgeting?

To bridge temporary revenue shortfalls and:

- Avoid mass layoffs
- Maintain stability for student support

Reasons for the Shortfall

- Loss of **ESSER funds**: ~\$2 million
- Federal **mental health funding cuts**: ~\$100K
- **Enrollment decline** (127 students since 2020): ~\$1M loss
- **Lilly Phase 2** (\$450K) will be received in June 2025 so reflected in the FY 25 financials

Outlook: Why It's a Bridge

Known future funding:

- **2028 property tax sharing**: Est. \$1.8M (\$2050/pupil)

Potential additional funding (uncertain):

- **Lilly Phase 3**: Up to \$15M over 5 years (invited to next round)
- **SIG Grant**: Up to \$3M over 3 years (application submitted, decision in fall)

Proposed Staffing Changes

- **VAR**:
 - Eliminate 1 licensed Kindergarten teacher (will have 3 licensed teachers for 2 Kdg classrooms like 24-25)
 - 1 MS Resource Teacher (covered via K-8 program restructuring)
 - 1 MS Math Interventionist
- **AMA**:
 - 1 Associate Teacher (formerly a building sub role, now covered through a sub services agency)
 - Add an IIR interventionist (increase in students in this program)
- **USI**
 - Add a Lead Literacy Coach (title TBD) this was included in the Lilly Phase 2 budget

**UNITED SCHOOLS OF INDIANAPOLIS - CONSOLIDATED
2025-2026 PROPOSED BUDGET
Presented to Board on June 16, 2025**

NET INCOME:

The proposed budget projects a Net Operating Loss of (\$897,623). This is a decrease of \$1 million from the current year.

CASH FLOW:

Cash projections for the current year indicate that we will end FY25 with a cash balance of approx \$3.3M. The proposed budget for FY26 projects a decrease in cash of \$234K by end of year.

BOND COMPLIANCE:

The bond agreement requires that USI have at least 45 days unrestricted cash on hand (consolidated). Projections calculate an ending DCOH of 62.

The bond agreement also requires that we have a debt service ratio of 1.1 or higher. Projections indicate that our DSR at 6/30/25 would be 0.70. In order to meet the 1.10 required, USI would need approximately \$550,000 of additional net income to meet the 1.10 requirement.

REVENUE:

Student Enrollment (ADM):

We are assuming that ADM counts for FY26 will increase compared to current year actuals.

	AMA	VAR	AMMS	Total
Fall / Spring FY25 actuals:	332 / 320	391 / 393	192 / 196	915 / 909
Fall / Spring FY25 projections:	350 / 340	410 / 400	204 / 199	964 / 939

State Support:

Per pupil funding is comprised of two parts: Foundation and Complexity. For FY26 the state budget reflects an increase in Foundation from \$6,682 per pupil to \$6,816.

	AMA	VAR	AMMS	Total	Average
Actual per pupil for FY25	8,930.81	8,731.30	8,337.65		8,666.59
Projected per pupil for FY26	9,064.46	8,864.95	8,471.79		8,800.40
Variance in revenue for FY26	68,435	(11,358)	31,197	88,274	

Other State Funding:

Beginning in FY22, AMMS began receiving funds from the IPS Referendum. The budget assumes that for FY26 85% of AMMS students will be in IPS district and eligible for the \$500 per pupil funding.

Projections also include the Charter School Grant at \$1,500 per pupil as approved in the state budget. Other state funds include Special Ed funds, Medicare reimbursements, textbook reimbursement, etc. Estimates for FY26 are based on current year's actuals and adjusted appropriately.

Federal Funding:

Federal funding includes School Nutrition Program reimbursements, Title I funding, IDEA Part B (Special Ed), Title II, Title IV, etc. We have budgeted conservatively based on the current year's grant allocations.

Fundraising / Private Contributions:

Fundraising efforts are expected to generate \$665K in revenue. \$240K of this is expected to be from Perkins.

Fundraising expenses are projected to be \$32K.

UNITED SCHOOLS OF INDIANAPOLIS - CONSOLIDATED

2025-2026 PROPOSED BUDGET

Presented to Board on June 16, 2025

EXPENSES:

Personnel:

# of FTE positions:	AMA	VAR	AMMS	USI	Total
Elementary Instruction	28	15	0	0	43
Middle School Instruction	0	13	13	0	26
Special Ed	6	7	5	0	18
Administration	9	10	7	9	35
Total Staff	43	45	25	9	122

Bond Costs:

Bond Principal for FY26 is \$445K. Interest payments are \$996K.

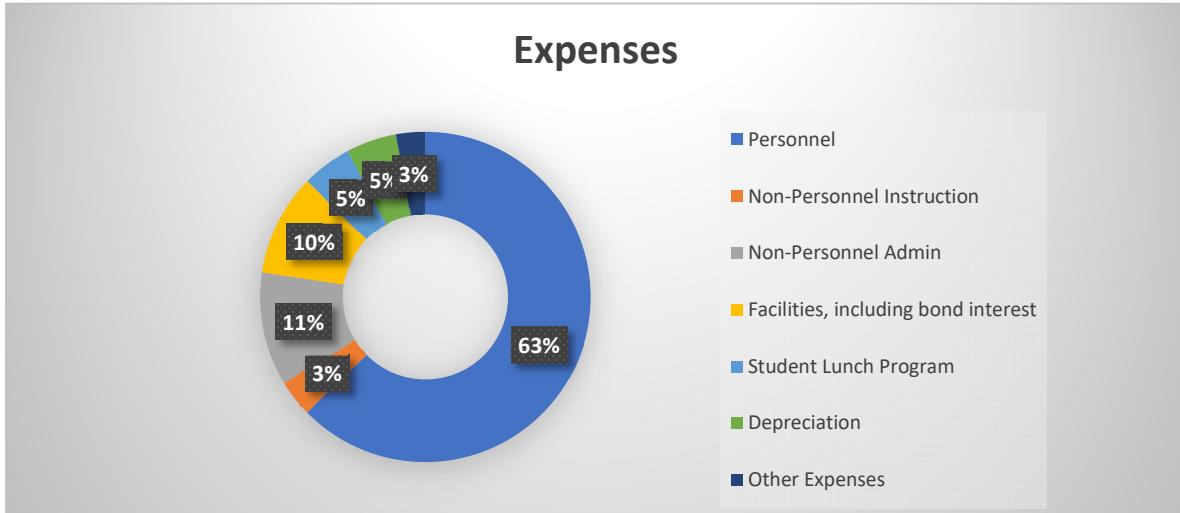
Network Fees:

Each school has budgeted a percentage of state per pupil funding as a fee to the Network office to cover shared expenses (such as legal fees, accounting/payroll/audit services, technology services, insurance expense, support staff, etc). Fees charged to each school equal:

AMA	VAR	AMMS
12.5%	14.5%	6.0%
390,905	520,594	102,424

Other Expenses:

All Other Expenses have been compared to what was budgeted in the current year and how the school is performing compared to budget. Adjustments have been made accordingly.



UNITED SCHOOLS OF INDIANAPOLIS
2025-2026 PROPOSED BUDGET
Presented to Board on June 16, 2025

	2024-2025 Proposed Budget	2025-2026 Proposed Budget	Increase / (Decrease)
REVENUE			
Private Funding	675,000	709,000	34,000
State Funding	11,372,031	11,586,062	214,031
Federal Funding	4,387,992	2,532,000	(1,855,992)
Other Income	1,105,972	1,240,422	134,450
TOTAL REVENUE	17,540,995	16,067,484	(1,473,511)
EXPENSES			
Instructional Expenses			
Personnel	6,703,344	6,227,688	(475,656)
Supplies and Materials	337,500	267,500	(70,000)
Professional Services	215,000	303,000	88,000
Staff Training	61,100	41,000	(20,100)
Total Instructional Expenses	7,316,944	6,839,188	(477,756)
Administrative Expenses			
Personnel Expense	4,285,666	4,408,058	122,392
Supplies and Materials	263,800	231,550	(32,250)
Professional Services	1,737,354	1,575,846	(161,508)
Marketing	77,500	75,000	(2,500)
Total Administrative Expenses	6,364,320	6,290,454	(73,866)
Facilities Expense	681,700	666,880	(14,820)
Student Lunch Expense	825,000	830,000	5,000
Transportation Expense	15,000	21,200	6,200
Technology Expenses	165,140	154,365	(10,775)
Interest Expense	1,044,126	1,022,876	(21,250)
Community Services	24,000	16,000	(8,000)
Extra-Curricular Expenses	100,000	120,600	20,600
Depreciation Expense	769,590	833,008	63,418
Other Expenses	132,060	170,536	38,476
TOTAL EXPENSES	17,437,880	16,965,107	(472,773)
NET INCOME	103,115	(897,623)	(1,000,738)
CAPITAL PURCHASES	630,000	707,400	77,400
CASH FLOW - All operating funds			
Beginning cash	3,002,121	3,782,582	780,461
Plus total cash in	17,540,995	16,067,484	(1,473,511)
Minus total cash out	(17,723,290)	(17,264,499)	458,791
Ending cash	2,819,826	2,585,567	(234,259)
Days Cash On Hand:	66	62	(3)

	2024-2025 Proposed Budget	2025-2026 Proposed Budget	Increase / (Decrease)
DEBT SERVICE COVERAGE RATIO			
Net Operating Income	103,115	(897,623)	
Add back Depreciation	769,590	833,008	
Add back Bond Interest	1,044,126	1,022,876	
Net Income Available for DS	1,916,831	958,261	
Annual Debt Service	1,442,969	1,359,839	
DSR	1.33	0.70	(0.62)

UNITED SCHOOLS OF INDIANAPOLIS
2025-2026 PROPOSED BUDGET
Presented to Board on June 16, 2025

	AMA	AMMS	VAR	NETWORK	SUBTOTAL	INTERCOMPANY ELIMINATION	TOTAL
REVENUE							
Private Funding							
Contributions/Perkins	-	-	-	240,000	240,000	-	240,000
Contributions/Other	-	-	-	425,000	425,000	-	425,000
Mental Health Services (CCC)	-	44,000	-	-	44,000	-	44,000
Total Private Funding	-	44,000	-	665,000	709,000	-	709,000
State Funding							
Basic Tuition	3,127,237	1,707,065	3,590,303	-	8,424,605	-	8,424,605
IPS Referendum	-	86,700	-	-	86,700	-	86,700
Operations Levy Distribution	119,400	70,200	144,400	-	334,000	-	334,000
State Special Ed	150,000	210,000	225,000	-	585,000	-	585,000
Summer School Reimb	100,000	50,000	75,000	-	225,000	-	225,000
School Safety Grant	40,000	20,000	40,000	-	100,000	-	100,000
Charter School Grant	490,000	285,600	574,000	-	1,349,600	-	1,349,600
Formative Assessment	7,500	3,000	8,000	-	18,500	-	18,500
Early Intervention Rdg Recov	-	-	-	-	-	-	-
BSCA (CCC)	-	-	85,000	-	85,000	-	85,000
IN Literacy Cadre	29,717	-	30,440	-	60,157	-	60,157
Medicaid Reimbursement	12,000	10,000	9,000	-	31,000	-	31,000
NESP	10,000	5,000	22,000	-	37,000	-	37,000
Teacher Appreciation	12,000	7,000	14,000	-	33,000	-	33,000
Textbook Reimbursement	52,000	30,000	62,000	-	144,000	-	144,000
McKinney Vento	10,000	2,500	10,000	-	22,500	-	22,500
Digital Learning Grant	20,000	10,000	20,000	-	50,000	-	50,000
Other State Funding	-	-	-	-	-	-	-
Total State Funding	4,179,854	2,497,065	4,909,143	-	11,586,062	-	11,586,062
Federal Funding							
Federal Special Ed	80,000	53,000	110,000	-	243,000	-	243,000
Federal Lunch/Breakfast	300,000	180,000	350,000	-	830,000	-	830,000
Title I	488,500	230,500	504,000	-	1,223,000	-	1,223,000
Title II	52,000	35,000	61,000	-	148,000	-	148,000
Title IV	49,000	12,000	27,000	-	88,000	-	88,000
Other Federal Funding	-	-	-	-	-	-	-
Total Federal Funding	969,500	510,500	1,052,000	-	2,532,000	-	2,532,000
Student Fees	16,000	19,000	20,500	-	55,500	-	55,500

	AMA	AMMS	VAR	NETWORK	SUBTOTAL	INTERCOMPANY ELIMINATION	TOTAL
REVENUE							
Gain on Investment	85,000	-	-	80,000	165,000	-	165,000
Other Income	3,000	1,000	2,000	1,013,922	1,019,922	(1,021,472)	(1,550)
TOTAL REVENUE	5,253,354	3,071,565	5,983,643	1,758,922	16,067,484	(1,021,472)	15,046,012
EXPENSES							
Instructional Expenses							
Personnel	2,469,394	1,329,120	2,429,174	-	6,227,688	-	6,227,688
Supplies and Materials	89,500	62,000	116,000	-	267,500	-	267,500
Professional Services	119,000	51,000	133,000	-	303,000	-	303,000
Staff Training	13,500	8,500	14,000	5,000	41,000	-	41,000
Total Instructional Expenses	2,691,394	1,450,620	2,692,174	5,000	6,839,188	-	6,839,188
Administrative Expenses							
Personnel Expense	1,131,097	661,308	1,263,185	1,352,468	4,408,058	-	4,408,058
Supplies and Materials	71,500	36,550	81,000	42,500	231,550	-	231,550
Professional Services	497,620	198,358	678,398	201,470	1,575,846	(1,021,472)	554,374
Marketing	25,000	15,000	30,000	5,000	75,000	-	75,000
Total Administrative Expenses	1,725,217	911,216	2,052,583	1,601,438	6,290,454	(1,021,472)	5,268,982
Facilities Expense							
Student Lunch Expense	238,320	171,240	257,320	-	666,880	-	666,880
Transportation Expense	300,000	180,000	350,000	-	830,000	-	830,000
Technology Expenses	7,000	4,700	9,500	-	21,200	-	21,200
Interest Expense	59,780	30,780	60,080	3,725	154,365	-	154,365
Community Service	278,174	241,392	503,310	-	1,022,876	-	1,022,876
Extra-Curricular Expenses	6,000	4,000	6,000	-	16,000	-	16,000
Depreciation Expense	26,000	44,000	50,600	-	120,600	-	120,600
Other Expenses	301,749	158,247	371,303	1,709	833,008	-	833,008
TOTAL EXPENSES	5,642,154	3,203,271	6,362,050	1,757,632	16,965,107	(1,021,472)	15,943,635
NET INCOME	(388,800)	(131,706)	(378,407)	1,290	(897,623)	-	(897,623)
CAPITAL PURCHASES	342,400	15,000	350,000	-	707,400	-	707,400



RESOLUTION

IN RECOGNITION AND APPRECIATION OF DISTINGUISHED SERVICE BY

Aaron Williamson

WHEREAS, **Aaron Williamson** has served with distinction on the Board of Directors of the United Schools of Indianapolis from 2019 to 2025;

WHEREAS, **Aaron Williamson** graciously volunteered his time and expertise to United Schools of Indianapolis Board of Directors, providing invaluable insights and perspectives to the Governance Committee;

WHEREAS, **Aaron Williamson** has served on the Board of Directors with great professionalism, dedication, and distinction;

NOW, THEREFORE, BE IT RESOLVED that the United Schools of Indianapolis Board of Directors acknowledges and extends its gratitude to **Aaron Williamson** for his dedicated service to the network and notable contribution to USI's mission of providing a high quality education to families in underserved communities of Indianapolis;

AND BE IT FURTHER RESOLVED that this statement of appreciation be appropriately inscribed and conveyed to **Aaron Williamson** with a copy to be included in the official minutes of the June 16, 2025 meeting of the Board of Directors.

William Harris
Board Chair

RESOLUTION

Fringe Benefits Policy

Purpose

The purpose of this policy is to outline the fringe benefits offered to eligible employees of United Schools of Indianapolis (USI) as part of their total compensation package while ensuring compliance with state and federal regulations.

1. Health Insurance

- Eligible full-time employees (working 30 hours or more per week) are offered group health insurance.
- Coverage may include medical, dental, vision, and prescription benefits.
- USI contributes a portion of the premium; employees may be responsible for remaining costs through payroll deduction.
- Plan options and employee contributions are reviewed annually during open enrollment.

2. Retirement Benefits

- Employees are eligible to participate in the Teachers Retirement Fund (INPRS) if USI is a participating employer.
- Alternatively, USI may offer a 403(b) retirement plan with employer matching equal to the amount matched to those participating in TRF.
- Employees may make voluntary pre-tax or Roth contributions in accordance with IRS limits.

3. Paid Time Off (PTO)

- Full-time staff are eligible for annual paid time off including:
 - Sick/Personal Leave: 11 days annually
 - Vacation Days: Applicable for 12-month staff based on years of service.
 - School Holidays and Breaks: As outlined in the Staff Handbook

4. Family and Medical Leave

- USI complies with the Family and Medical Leave Act (FMLA) for eligible employees (employed for 12 months and worked 1,250 hours).
- Indiana's Parental Leave provisions may apply in specific cases.
- Additional unpaid leave may be approved by administration based on individual circumstances.

5. Professional Development

- Employees may be eligible for stipends or reimbursements for professional development and additional services rendered beyond the scope of their contract
- Attendance at approved conferences or workshops during USI year may be paid and considered work time.

6. Tuition Reimbursement / Loan Forgiveness Support

- USI supports participation in federal teacher loan forgiveness programs, including providing employment verification.

7. Life and Disability Insurance

- Employer-paid group term life insurance and short-term/long-term disability coverage is provided.
- Coverage amounts and eligibility will be outlined in the employee benefits summary.

8. Employee Assistance Program (EAP)

- Access to a confidential EAP may be provided to employees and their immediate family members who enroll in the medical and ancillary benefits offered by USI.

9. Additional Benefits

- Optional benefits may include:
 - Health Savings Accounts (HSA)
 - Transportation stipends
 - Cell Phone Reimbursement

Eligibility and Enrollment

- Eligibility begins on the first day of the month following the first day of employment.
- Employees must enroll during initial eligibility or annual open enrollment, unless a qualifying life event occurs.

Administration and Amendments

- This policy is administered by the Human Resources Department.
- USI reserves the right to modify or terminate any fringe benefit program at its discretion, with appropriate notice to employees.



USI PTO Accrual Policy

This policy establishes guidelines for Paid Time Off (PTO) accrual, usage, and payroll processing for full-time employees.

Eligibility

- Only full-time employees (40 hours per week) are eligible for PTO accrual.
- Part-time, temporary, and contract employees are not eligible for PTO under this policy.

PTO Accrual

- PTO accrues biweekly at a fixed rate per pay period.
- Full-time employees accrue 6.77 hours per biweekly pay period, totaling 88 hours (11 days) per year. This rate allows one to accrue the full annual PTO within 13 pay periods.

Pay Frequency	Accrual Rate per Pay Period	Annual PTO Earned
Biweekly (13 pay periods)	6.77 hours	88 hours / 11 days

- Accrual begins on the first day of employment
- Accrual ends on the last teacher workday of the academic year.
- PTO balances are updated and reflected in the payroll system each pay period.
- All absences (including tardies and early dismissals) used during the week must be entered into Paylocity no later than 4:00 p.m. on Friday of the same week in order to avoid disciplinary action.

Bereavement

- Each eligible full time employee will receive 40 bereavement hours annually to be used at their own discretion.

Maximum PTO Accrual Cap

- PTO accrual is capped at 184 hours.
- Once the cap is reached, additional PTO will cease to accrue.

Requesting & Using PTO



- Planned PTO: Requests must be submitted at least 10 days in advance.
- Unplanned PTO (e.g., sick leave): Employees must notify their manager according to notification procedures outlined in the Staff Handbook.

PTO Rollover & Payout

- Year-End Rollover: All unused PTO rolls over into the next year, subject to the 184-hour accrual cap.
 - PTO is forfeited upon termination (or resignation).

Payroll Processing & Tracking

- PTO balances are tracked in the payroll system and appear on employee pay stubs.
- Negative PTO balances are not allowed unless pre-approved by Human Resources.

Policy Modifications

- This policy may be revised based on company needs and legal requirements.
- Each eligible full time employee will receive 40 bereavement hours annually to be used at their own discretion.

Recycled Inventory Policy

Purpose:

This policy establishes procedures for managing and redistributing used, surplus, or obsolete inventory in a sustainable, cost-effective, and environmentally responsible manner.

Scope:

Applies to all instructional materials, office supplies, technology, furniture, and other equipment owned by the school.

Objectives:

- Promote sustainability and environmental responsibility.
- Reduce costs through reuse of usable materials.
- Ensure compliance with local, state, and federal regulations.
- Support equitable distribution of resources within the school or network.

Policy Guidelines:**1. Inventory Assessment**

- Items deemed no longer needed, outdated, or underutilized shall be evaluated for usability by the Operations Manager or designated staff.
- Items must be inspected for safety, cleanliness, and functionality before being designated for recycling or redistribution.

2. Reuse and Redistribution

- Items still in usable condition will be:
 - Reallocated to other classrooms, departments, or programs within the school.
 - Offered to other charter schools or educational nonprofits within the network.
- Teachers and staff will be notified via internal bulletin or email when surplus items are available.

3. Recycling and Disposal

- Items that cannot be reused shall be:
 - Recycled in accordance with local recycling guidelines (e.g., electronic waste, paper, plastic).
 - Donated to authorized community organizations or recycled through certified vendors.
 - Disposed of only when no other responsible option is available, and in accordance with local laws.

4. Recordkeeping

- All inventory changes must be documented in the school's asset management system.
- Records will include the reason for recycling or disposal, method used, and recipient if donated.

5. Technology Disposal

- All data must be wiped from electronic devices prior to redistribution or disposal, following FERPA and cybersecurity best practices.
- IT staff must certify that devices are sanitized before removal from inventory.

6. Reporting and Review

- An annual report will be prepared detailing items recycled, reused, or disposed of, along with associated cost savings and environmental benefits.
- The policy will be reviewed biennially to reflect best practices and regulatory updates.

Responsibilities:

- **Operations Manager:** Oversees implementation and compliance with this policy.
- **School Staff:** Responsible for notifying administration when items are no longer needed.
- **IT Department:** Ensures proper data handling and electronic recycling compliance.