

School LAND Trust Program
Best Practices as determined by
The Compliance Review Process
July 2018

School Children's Trust section staff has completed the compliance review process for FY2017 under the direction of Section Director Paula Plant in accordance with R277-477-7.3

The section reviews 10% of the districts and charter schools annually.

These reviews prove valuable as we assess where we can improve in training and communication, and if any laws or rules were not adhered to regarding financial controls and expenditures.

Some best practices we identified are:

- Elections
 - Elections must be noticed at least 10 days before listing:
 - Date(s), time, location
 - How many positions are open
 - How to file to participate
 - Terms must be staggered
 - Principal oversees elections of both parents and faculty/staff member(s)
 - Size of the council must be decided before the election process begins (Rules of Order and Procedure)
- Membership
 - Must have at least one faculty/staff member, and must have a 2 parent majority
 - The chair of the council must be a parent member
 - The principal is the only member that serves ex officio. No one else is appointed based on his or her office or position (e.g., vice principal, counselor, PTA/O President).
 - Contact information is required on the school website and SchoolLANDTrust.org
 - Please keep both your school website and SchoolLANDTrust.org up to date if there are any midyear membership changes
- Open meetings requirements for Councils
 - Meetings should never be closed.
 - Business cannot take place over email, and can only take place electronically if there is a district-approved policy outlined in the council's Rules of Order and Procedure and the meeting is noticed with instructions for public participation.
- Minutes
 - Must be retained for 3 years.
 - Please record motions, votes and results.
- School Website requirements
 - On or before October 20th:
 - Council member names with direct email, phone # or both
 - Proposed meeting schedule for the school year
 - A report to parents on how program funds were used in the prior year, and what was accomplished for students
 - At least one week before each meeting:

- Notice time, place, date of the meeting
 - Meeting Agenda (with items to be voted on labeled Action Items)
 - Draft Minutes of Previous Meeting
 - Always on the website:
 - Opportunities provided to parents to serve
 - Dollar amounts received each year through the program
 - Rules of Order and Procedure
- Correctly entering required reports on the SchoolLANDTrust.org website
 - Fall (after August 1 but before October 20):
 - Council membership with contact info
 - Final report for previous year's plan
 - Check that school expenditures agree with district reported expenditures and proposed expenditures in the plan
 - Report on goals including measurement of student achievement
 - Spring
 - Principal Assurance
 - Progress Report
 - Upcoming Plan
 - Goals are student focused
 - Expenditures are identified in the action plan
 - Behavioral interventions are directly tied to academic goals
 - Signature Page
 - Should be submitted with upcoming plan for board review
- Excess carry over/The amendment process
 - Anything over 10% automatically is flagged (may be reduced)
 - Review the budget with the council regularly
 - Amend plan as needed. Vote and post on SchoolLANDTrust.org
 - Tell your district the amendment has been entered so the board can review and have USBE SCT do the final review.
- Implement the plan as approved or amend it.
- Take the opportunity before the end of the FY to make sure items purchased with TL funds are coded correctly by the district, and that other purchases are not coded TL incorrectly.
- Be careful when budgeting for General Supplies that you are only purchasing items needed to implement the plan. The program was not intended for a general supply fund.