

# Lydia Patterson Institute

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## Employee Handbook School year 2025 – 2026

## Introduction

Welcome to Lydia Patterson Institute

You are an integral part of a team of professional and dedicated teachers and employees who are, like you, responding to the Lord's call to serve Him at Lydia Patterson Institute. We appreciate you and the God-given talents that you bring to this ministry. We are committed to helping you achieve your highest level of service for the Lord in the ministry of educating children in godly principles and knowledge. A unique blessing of a Christian school is the coming together of a Christian family. It is this bond of believers that provides the foundation for a working environment that is unique in the professional world. The eternal impact of your ministry to children and their parents will outweigh anything the world has to offer!

This handbook applies to all employees and is intended to provide guidelines, personnel policies, procedures, responsibilities, benefits and rules of conduct. It is important that you read, understand and become familiar with this handbook and comply with the standards that have been established. This handbook may be updated from time to time with or without notice and is available on Lydia Patterson Institute's employee dashboard or from the President/Head of School who is the Human Resources officer.

Again, welcome to Lydia Patterson Institute (LPI) team. We are blessed to have you!

Carla Cardoza – President/Head of School

“Be strong and courageous. Do not be afraid; do not be discouraged, for the Lord your God will be with you wherever you go.” —Joshua 1:9

## **Statement of Faith**

Lydia Patterson Institute is a Christ-centered educational ministry rooted in the tradition and teachings of the United Methodist Church. We affirm our identity as a faith-based institution committed to the spiritual formation, academic excellence, and holistic growth of every student entrusted to our care.

### **We believe in:**

#### ***God's Grace and Love for All People***

We believe in a loving and merciful God, revealed to us through Jesus Christ, who calls us to love God and neighbor without exception. Grounded in the Wesleyan tradition, we affirm that God's grace is freely given to all, and that every person—regardless of race, background, or status—is of sacred worth and capable of transformation through faith and education.

#### ***Faith in Action***

We believe that faith must be lived. Inspired by John Wesley's call to "do all the good you can," we seek to serve others with compassion, justice, and humility. Our classrooms, chapels, and community embody the Gospel through acts of service, hospitality, and advocacy for the voiceless. Education at LPI is an expression of our faith—a tool for both personal growth and social change.

#### ***The Power of Education to Transform Lives***

We believe that education is a holy endeavor—an act of liberation and empowerment. Since our founding in 1913, we have answered God's call to provide quality, faith-rooted education to underserved students, particularly those living on or near the U.S.–Mexico border. We honor our legacy as a school that bridges cultures, languages, and nations in the name of Christ.

#### ***Ministry at the Border***

We embrace our unique calling as a border ministry. Our students cross physical and metaphorical borders every day—between nations, languages, and identities. In this sacred space, we proclaim that God's love knows no borders and that justice, education, and opportunity must extend beyond walls. Our border identity is not a limitation; it is a blessing—a source of strength, resilience, and perspective.

#### ***Unity in Diversity***

We affirm the global and inclusive nature of the Church and seek to foster a community that reflects the diversity of God's kingdom. We educate students to embrace their cultural heritage while learning to walk with integrity, faith, and leadership across cultural lines. We welcome all who share our mission to transform the world through faith, learning, and service.

#### ***Partnership with the United Methodist Church***

We are proud to be a ministry of the South Central Jurisdiction of the United Methodist Church, and we walk hand in hand with congregations, conferences, and individual believers who share in the responsibility of nurturing the next generation. Our mission is

a shared calling—supported, prayed over, and made possible by the faithful connection of our Methodist family.

At Lydia Patterson Institute, our faith guides our vision, our values, and our daily walk. We serve not for recognition, but in obedience to Christ's command to love, teach, and uplift. May we continue to be a light on the border—where faith meets learning, and where students rise.

***Forward in Faith. Forward in Mission. Forward in Love.***

Employment at Lydia Patterson Institute is contingent upon execution of and adherence to the School's Statement of Faith and all provisions therein. As an employee of Lydia Patterson, you represent Lydia Patterson Institute in both your work life and your private life. Accordingly, any violation of the School's Statement of Faith, Guiding Principles, or written policies may result in disciplinary action up to and including termination of employment, at the sole discretion of Lydia Patterson Institute.

**Philosophy of Education**

At Lydia Patterson Institute (LPI), we believe that education is a sacred calling—a transformative act of faith, justice, and empowerment. Rooted in Christian values and a commitment to academic excellence, we view education as both a spiritual and intellectual journey, where each student is seen, known, and equipped to thrive.

Our philosophy is guided by the following core beliefs:

**1. Education as a Ministry of Hope**

We believe that every child is created in the image of God, endowed with dignity, potential, and purpose. Our role is not merely to instruct, but to inspire—to nurture each student's gifts and guide them toward a life of service, leadership, and meaning. Education at LPI is a ministry of hope that opens doors, heals divides, and strengthens communities.

**2. Faith-Based, Student-Centered Learning**

Our approach integrates faith and learning. We teach not only academic content, but also character, compassion, and spiritual resilience. We develop the whole child—mind, body, and spirit—by providing a safe, nurturing environment where faith and inquiry flourish together. Every student is valued, respected, and challenged to grow.

**3. Cross-Cultural and Bilingual Empowerment**

Located on the U.S.-Mexico border, LPI embraces its unique role in shaping global citizens who can bridge cultures and languages. We celebrate bilingualism and biculturalism as strengths, preparing students to lead with empathy, integrity, and global awareness. Our classrooms reflect the diversity of our region, honoring our students' heritage while preparing them for a future without borders.

**4. Excellence through Access and Equity**

We believe that high-quality education should never be limited by geography, background, or financial circumstances. That's why 100% of our students receive scholarships. We

challenge inequality with opportunity, offering rigorous academics, college and career readiness programs, and holistic support to students who might otherwise be overlooked.

Our students are not defined by their challenges—they are resilient, gifted, and ready to make a difference.

## **5. Community, Leadership, and Responsibility**

Education is a shared endeavor. We believe in cultivating strong partnerships between students, families, educators, churches, and supporters. Through mentorship, student leadership opportunities, community service, and spiritual formation, we foster a deep sense of responsibility to others and to the world. Our graduates are prepared not only for college, but for lives of purpose and service.

At Lydia Patterson Institute, we don't just educate—we uplift. We prepare students to dream boldly, lead faithfully, and serve joyfully. Our philosophy of education is a living expression of our faith and our conviction that every child—regardless of origin—deserves the chance to rise.

### **School Information**

#### ***Mission Statement***

Lydia Patterson Institute is committed to providing an environment where Christian faith, values, and knowledge converge to give students a cross-cultural, academic, and state-of-the-art education by creating opportunities to develop skills to succeed and transform a changing world.

#### ***Goals and Objectives***

Lydia Patterson Institute is committed to providing a comprehensive education to young students by helping them acquire knowledge, skills, values, and attitudes that will enable them to become responsible individuals and promote academic development. Our focus is to instill academic excellence, strong values, and a sense of social responsibility that will help students gain entry to higher education institutions.

### **School Accreditation**

Lydia Patterson Institute, LPI, founded in 1913, is a faith-based college preparatory governed by a Board of Trustees. Lydia Patterson Institute enrolls students 7<sup>th</sup> grade through 12<sup>th</sup> grade. Lydia Patterson Institute is accredited by Cognia, the Association of Christian Schools International (ACSI).

### **Governance Board**

Lydia Patterson Institute is governed by a Board of Trustees. They share the vision for Lydia Patterson Institute and have a vested interest in its success. The Board is

responsible for Lydia Patterson Institute's long-term mission and vision. The Board hires only one employee, the President/Head of School, and delegates all day-to-day operations through explicit governing policies to the President/Head of School.

### **Chain of Command**

The Governance Board hires the President/Head of School. The hiring of all other employees is the responsibility of the President/Head of School. The President/Head of School implements the spiritual vision and direction of Lydia Patterson Institute and provides spiritual leadership to the LPI employees, students and parents.

The President/Head of School is the principal executive officer of Lydia Patterson Institute. The President/Head of School appoints a Principal to assist him or her in all aspects of the day-to-day academic operation of Lydia Patterson Institute. The Business Manager assist him or her in all aspects of financial and administrative functions of Lydia Patterson Institute. The Support Services Manager assists him or her in all aspects of school facilities and maintenance as well as food services. The Development and Communications Director assists him or her in all aspects of development and fundraising. The teachers are responsible to the respective Principal and Assistant Principals for carrying out the program of instruction. Teachers are responsible for providing safe, attractive, well maintained environments. The well-being and safety of each child along with maintaining order in the classroom at all times is the priority of each employee.

### **Administration**

Employees may have questions or concerns that require the attention of campus administration staff. As a valued employee, we encourage you to reach out to the appropriate department for assistance. Below is a list of Administration staff that can provide the necessary support and guidance to address your queries and concerns.

### **Employee Statement of Commitment**

Lydia Patterson employees are dedicated to challenging students to reach their highest potential intellectually, creatively, physically and socially for the glory of Jesus Christ. Our employees are committed to go beyond their classroom and office duties to have a personal knowledge of students and involvement in their lives. Personal mentoring, discipling, and guidance from employees on a daily basis continues to have a powerful impact upon Lydia Patterson students' lives. It is the relationships between LPI employees, and students that contribute to the testimony of Lydia Patterson. All employees have ascribed to Lydia Patterson Institute Statement of Faith.

“A student is not above his teacher, but everyone who is fully trained will be like his teacher.” Luke 6:4

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## **Handbook**

This handbook has been prepared for the information and guidance of employees who work at Lydia Patterson Institute. Although it cannot address every situation, it is intended to cover the procedures, rules, and policies most often encountered in day-to-day activities. Some of the information or policies in this Employee Handbook may change from time to time. Violation of any policy by an employee contained in this Employee Handbook can lead to disciplinary action up to and including immediate termination. No set of policies, procedures or rules can cover every situation that might arise. Accordingly, the Employee Handbook does not restrict Lydia Patterson Institute's right to deviate from the Employee Handbook as deemed appropriate by Lydia Patterson Institute. Non-enforcement of any provision of the Employee Handbook does not waive future enforcement. Neither this Employee Handbook, nor any of the policy statements contained in this Employee Handbook, are a contract or create any contractual rights.

All employees are responsible for reading and understanding this handbook's contents, as it is a crucial component of their employment with the school. As an employee, you are responsible to behave appropriately at work. We outline our expectations here. We can't cover every single case of conduct, but we trust you to always use your best judgement. Reach out to your manager or HR if you face any issues or have any questions.

We welcome constructive feedback and suggestions for additions and improvements to this handbook. Please direct any communication in this regard to the President.

### ***Notice of Possible Revisions to Handbook Policies and Procedures***

*As stated in greater detail in the Handbook Policies and Procedures section, no set of rules or guidelines can cover every conceivable situation that might arise. The rules, policies, and procedures set forth in this handbook are intended to apply under normal circumstances. However, from time to time, there may be situations that require immediate or nonstandard responses.*

*Lydia Patterson Institute may, from time to time, need to deviate from the normal rules and procedures for the safety and well-being of all. We encourage careful monitoring of Lydia Patterson Institute communications and Lydia Patterson Institute website for important updates, changes and news.*

# **SECTION 1: EMPLOYMENT INFORMATION**

**SECTION: Employment Information**  
**POLICY: Equal Employment Opportunity**  
**POLICY #: 1.01**

**Equal Employment Opportunity**

Lydia Patterson Institute provides equal employment opportunities to all employees and applicants for employment without regard to race, color, gender, national or ethnic origin, age, disability, genetic information, veteran status or any other legally protected status applicable to Lydia Patterson. This applies to all employment practices, including recruitment, hiring, compensation, benefits, promotion, training, discipline, transfer, demotion, selection for layoff, termination, and all other terms, conditions, and privileges of employment.

*Lydia Patterson Institute reserves the right to use religion as a hiring criterion, due to the mission and nature of the school as a faith-based institution, as permitted by law.*

**SECTION: Employment Information**  
**POLICY: At Will Employment**  
**POLICY #: 1.02**

**At Will Employment**

Employees of Lydia Patterson Institute voluntarily enter into their employment. Absent an express contract between an employee and Lydia Patterson Institute for a definite term governing the employment relationship, all employees of Lydia Patterson Institute are employed “at-will”. At-will employment means that both employees and Lydia Patterson Institute have the right to terminate the employment relationship at any time, with or without notice, and with or without cause. Nothing in this Employee Handbook, or other policy or practice, modifies the at-will nature of employment with Lydia Patterson.

**SECTION: Employment Information  
POLICY: American with Disabilities  
POLICY #: 1.03**

**Americans with Disabilities Act**

The Americans with Disabilities Act (ADA) prohibits discrimination against qualified individuals based on their disability when it comes to job application procedures, hiring, employee compensation, job training, and other employment privileges. The ADA Amendments Act of 2008 brought about changes to the law, please see the link below. At Lydia Patterson Institute, we ensure that all individuals, including those with disabilities, are given equal employment opportunities. In the workplace, a qualified individual with a disability will receive the same opportunities as those without disabilities and will be held to the same performance standards and requirements.

**SECTION: Employment Information**  
**POLICY: Force Majeure**  
**POLICY #: 1.04**

**Force Majeure**

Lydia Patterson Institute's duties and obligations under this Agreement shall be suspended immediately without notice during all periods that Lydia Patterson Institute is closed because of force majeure events including, but not limited to, any fire, act of God, hurricane, war, governmental action, act of terrorism, epidemic, pandemic or any other event beyond Lydia Patterson Institute's control. If such an event occurs, Lydia Patterson Institute's duties and obligations will be postponed until such time as Lydia Patterson Institute, in its sole discretion, may safely reopen. In the event that Lydia Patterson Institute cannot reopen due to an event under this clause, Lydia Patterson Institute is under no further obligations, including any payment obligations beyond the last day that the Employee actually worked.

**SECTION: Employment Information**  
**POLICY: Immigration Law**  
**Compliance**  
**POLICY #: 1.05**

**Immigration Law Compliance**

Lydia Patterson Institute is committed to adhering to all applicable state and federal laws and regulations governing the employment of individuals authorized to work in the United States. In compliance with the Immigration Reform and Control Act of 1986. Any employee with questions or concerns about immigration law issues is encouraged to contact Human Resources/President/Head of School.

Each newly hired employee must complete the Employment Eligibility Verification Form I-9 and provide documentation to establish their identity and eligibility for employment. In addition to other requirements. During orientation on the first day of work, employees will be expected to complete an onboarding process that will include employment and benefits documentation.

**SECTION: Employment Information**  
**POLICY: Background Checks**  
**POLICY #: 1.06**

**Background Checks**

Lydia Patterson Institute upholds a policy of conducting background checks for all applicants and employees as a measure to ensure a safe and secure work environment. These comprehensive checks encompass evaluations of employment history, references, education, and criminal records to establish eligibility for employment. LPI performs individualized assessments, considering specific job responsibilities when reviewing background check findings. All acquired information is used exclusively for employment purposes and is maintained in strict confidence in compliance with relevant laws. LPI adheres to the Fair Credit Reporting Act and all pertinent federal, state, and local regulations governing background checks.

**SECTION: Employment Information  
POLICY: Whistleblower  
POLICY #: 1.07**

**Whistleblower Policy**

Lydia Patterson is committed to pursuing high standards of ethical, moral, and legal business conduct. To uphold these standards, Lydia Patterson encourages all employees who have knowledge or suspicions of any abuse, illegal or dishonest activity within the school to report such activities to one or more of the parties specified in this policy. Conduct that must be reported includes, without limitation, any illegal or potentially illegal conduct or any conduct that threatens or may threaten the well-being of any student, employee, or other individual.

If an employee has knowledge of or a concern about illegal or dishonest activity, the employee is to contact the President/Head of School or the Director of Human Resources. Due to the serious and sensitive nature of such complaints, the employee must exercise sound judgment to avoid baseless allegations. An employee who intentionally files a false report of wrongdoing will be subject to corrective action up to and including termination.

Lydia Patterson reserves the right to refer allegations of unlawful conduct to appropriate law enforcement agencies. The filing of a criminal complaint or conduct of a criminal investigation shall not affect Lydia Patterson Institute's right to investigate allegations of discrimination, harassment, or other misconduct. All interviews, allegations, statements, and identities will remain confidential to the extent possible and allowed by the law.

The policy ensures that Employees are protected from any form of retaliation when they, in good faith, report suspected illegal or fraudulent practices or violations of adopted policies of Lydia Patterson Institute.

Lydia Patterson Institute will not discharge, discipline, threaten, discriminate against, or penalize an Employee, or take other retaliatory action regarding an employee's compensation, terms, conditions, location, or employment privileges.

These whistleblower protections do not:

- Authorize Employees to disclose data otherwise legally protected or privileged.
- Permit an Employee to make knowingly false statements or disclosures.
- Permit illegal disclosures or disclosures that impair another's right to confidentiality in their communications.

**Reporting Procedure**

Employees are encouraged to report a complaint they, in good faith, have reasonable cause to believe is credible. Violations may include the quality and integrity of Lydia Patterson Institute accounting, auditing, and financial reporting,

controls, or procedures; legal or regulatory compliance; or any other legal or ethical matter.

To report a complaint, it should be sent in a sealed envelope marked "Confidential" to:

President, Lydia Patterson Institute 517 S. Florence Street, El Paso, TX 79901

### **Retaliation Prohibition**

Lydia Patterson prohibits retaliation against an employee who reports an activity that he or she considers to be abusive, illegal or dishonest. This includes, but is not limited to, protection from retaliation in the form of an adverse employment action such as termination, compensation decreases, or poor work assignments.

An individual within Lydia Patterson Institute who retaliates against a Employee who has submitted a report in good faith, or who retaliates against any person, who, in good faith, has cooperated in the investigation of a violation, is subject to discipline, up to and including termination.

**SECTION: Employment Information**  
**POLICY: Outside Employment & External**  
**POLICY #: 1.08**

**Outside Employment and External Commitments**

All employees must devote their full attention to Lydia Patterson during working hours. Full-time employees are permitted to maintain outside employment so long as it does not impede their performance or interfere with required job duties at Lydia Patterson. Employees may not work at or for a competitor. Employees are expected to contact their immediate supervisor and seek approval from Human Resources/President for any outside employment or graduate work.

Employees who are enrolled in graduate or doctoral programs must ensure that their academic responsibilities—such as coursework, research, residencies, or dissertation requirements—do not conflict with their professional obligations. Any graduate work must be discussed in advance with the employee’s supervisor to ensure clarity and alignment with the school’s expectations.

Employees are required to complete and submit the Graduate Studies Disclosure and Agreement Form. This form documents the employee’s academic program, anticipated time commitments, and acknowledgment that professional responsibilities remain the priority. The form must be signed by the employee and the supervisor, approved by HR/President before or at the start of the academic program. Failure to disclose graduate or doctoral program commitments, or to maintain professional responsibilities in alignment with Lydia Patterson Institute expectations, may result in disciplinary action.

Lydia Patterson Institute supports professional and academic growth, especially in fields that strengthen private school leadership, or enhance our understanding of the unique needs and potential of our students. If an employee’s research or thesis work involves our students, school data, or school community in any way, written approval must be obtained from HR/President and appropriate safeguards must be in place to protect privacy, comply with legal requirements, and maintain the integrity of the learning environment. Employees seeking such approval are required to complete and submit the Research & Thesis Work Approval Request and Agreement Form. This form documents the proposed project, outlines safeguards for student privacy and data protection, and affirms the employee’s agreement to comply with all legal, ethical, and school requirements. The form must be signed by the employee, supervisor and approved by HR/President before any research activities may begin. Failure to obtain prior written approval or to comply with the safeguards outlined in the signed agreement may result in denial of access to school resources.

**Tutoring**

Teachers may not tutor or coach their own students for remuneration.

**SECTION: Employment Information  
POLICY: Nepotism  
POLICY #: 1.09**

**Nepotism**

Lydia Patterson Institute's standards for employment decisions—such as hiring, promotion, reappointment, evaluation, salary adjustments, and termination—are based solely on qualifications for the position, ability, and performance. Lydia Patterson Institute seeks to avoid favoritism, the appearance of favoritism, and conflicts of interest in employment decisions, and reserves the right to take appropriate action when employee relationships or associations affect its mission.

Lydia Patterson Institute does not employ individuals who are related by blood, marriage, adoption, or other personal relationships in direct superior–subordinate positions due to the potential appearance of favoritism or conflict of interest. For example, a son may not be employed as a teacher reporting to his mother as a department chair.

In other cases where a conflict of interest—or the potential for one—exists between employees, even if there is no direct reporting line, Lydia Patterson Institute may separate the employees by reassignment or, if necessary, through termination of employment.

Employees are also expected to refrain from inappropriate public displays of affection while at school or during school-related activities. Lydia Patterson Institute is committed to ensuring that its operations do not create situations that may lead to conflicts of interest or bias. This policy extends to employee recruitment and promotion. Lydia Patterson Institute prohibits close relatives, partners, individuals in dating relationships, or those living together from holding positions where one would evaluate, supervise, or directly influence the other's terms and conditions of employment.

Employees are welcome to refer relatives for employment opportunities at Lydia Patterson Institute, provided the following restrictions are met:

- You may not supervise or be supervised by a relative.
- You may not be transferred, promoted, or hired into a reporting relationship with a relative.
- You may not serve on a hiring committee if your relative is an applicant for that position.

If, after employment begins, a supervisory relationship arises between relatives—through marriage, partnership, or other personal relationship—Lydia Patterson Institute may require one of the employees to transfer to another position or, if no transfer is feasible, to separate from employment.

**SECTION: Employment Information  
POLICY: Employee Relationships  
POLICY #: 1.10**

**Employee Relationships Policy**

Lydia Patterson Institute (LPI) is committed to maintaining a professional, respectful, and productive workplace. While we recognize that friendships and personal relationships may naturally develop among employees, these relationships must never interfere with professional responsibilities, the learning environment, or the reputation of Lydia Patterson Institute.

**1. Professional Conduct**

- Employees are expected to conduct themselves professionally at all times, ensuring that personal relationships do not disrupt the workplace.
- Personal disputes, favoritism, or the appearance of impropriety must be avoided.
- Sexual jokes, malicious gossip, and inappropriate comments about employee relationships will not be tolerated. Concerns should be reported directly to the President/Head of School.

**2. Fraternalization**

- *Fraternalization* includes dating, consensual romantic relationships, and close personal friendships between colleagues.
- Non-consensual relationships or behavior constitute sexual harassment or sexual violence and are strictly prohibited.

**3. Supervisor–Employee Relationships**

- Romantic or sexual involvement between a supervisor and any employee under their direct or indirect supervision is strictly prohibited.
- This restriction extends upward through the supervisory chain to prevent favoritism, abuse of authority, or conflicts of interest.
- Violation of this policy may result in corrective action, up to and including termination of the supervisor involved.

**4. Disclosure of Relationships**

- If a romantic relationship or a relative relationship is established between employees who are in a reporting relationship, the supervisor is required to immediately disclose the relationship to HR and the President/Head of School.
- Lydia Patterson Institute may reassign one of the individuals involved or, if no reassignment is feasible, require separation of employment.
- If a personal or romantic relationship develops between an employee and a parent/guardian of an enrolled student, this must also be disclosed to HR and the President/Head of School to ensure transparency and prevent conflicts of interest.

## **5. Peer Relationships**

Friendships and collegial relationships between peers are encouraged, as they contribute to communication and collaboration.

- However, employees must ensure that personal interactions remain professional during working hours and do not disrupt the workplace.

**SECTION: Employment Information  
POLICY: Solicitation & Distribution  
POLICY #: 1.11**

**Solicitation and Distribution Policy**

*Solicitation* is any form of requesting money, support, or participation for products, groups, organizations, or causes unrelated to Lydia Patterson Institute. This includes, but is not limited to:

- Selling goods or services for personal or outside benefit
- Promoting or recruiting for outside organizations (including churches, clubs, or political groups)
- Circulating petitions, gathering signatures, or fundraising for non-approved purposes
- Religious proselytizing or recruiting students, parents, or employees to attend or join another church or ministry

*Distribution* refers to disseminating literature, materials, or other communications for commercial, religious, or political purposes.

**General Restrictions**

- Solicitation between employees during school or at school-run activities is strictly prohibited.
- Solicitation or distribution of material on Lydia Patterson Institute property by non-employees is strictly prohibited at all times.
- Employees may not use Lydia Patterson Institute's email system, internal communications platforms, or other institutional resources for unauthorized solicitation.
- Employees may not directly approach students, parents, or colleagues for solicitation purposes unrelated to their professional duties.

**Specific Prohibited Examples**

The following activities are expressly prohibited to preserve the integrity of the school environment and avoid conflicts of interest:

- Recruiting or pressuring students or their families to attend another church, youth group, or ministry that is not affiliated with LPI or not formally approved by the President.
- Using the classroom, hallways, extracurricular activities, or school-sponsored events to promote another church, ministry, or outside religious organization.
- Distributing flyers, invitations, or social media group-links to students or parents encouraging attendance at another church's services, youth activities, or retreats.
- Selling raffle tickets, merchandise, or other items for personal profit or for groups not affiliated with or approved by Lydia Patterson Institute.

- Asking colleagues or students for signatures on petitions or to support political candidates, campaigns, or causes.

### **Permitted Solicitation**

With the President's prior written approval, solicitation information and sign-up sheets may be posted on Lydia Patterson Institute Bulletin Boards located in the lunchroom. In order to be approved, requests must follow these guidelines:

- Any sale of merchandise must benefit Lydia Patterson Institute or a recognized 501(c)(3) charitable organization.
- Solicitation for cash donations is not permitted.
- Direct person-to-person solicitation is not allowed.
- Requests must be made in writing and approved by the President before posting.

### **Employee-to-Employee Solicitation**

Employees may solicit from colleagues only in the following limited circumstances:

- To assist organize events for another employee (e.g., baby shower, retirement, promotion).
- To support a cause, charity, or fundraising event that is sponsored, funded, organized, or explicitly authorized by Lydia Patterson Institute.

In all cases, employees must not disturb or distract others from their work.

### **Consequences for Violation**

Violations of this policy—including the solicitation of students, parents, or employees for outside religious, political, or commercial purposes—will be considered a serious breach of professional conduct and may result in disciplinary action, up to and including termination of employment.

## **SECTION 2: Employee and Student Welfare Policies**

Lydia Patterson is committed to maintaining an environment of respect and dignity for its employees and students, an environment that is free from all forms of unwanted, improper, or unprofessional behaviors or communication. All Students and adults are to be treated with dignity, respect, sensitivity, and fairness. Lydia Patterson Institute establishes policies for employee and student welfare. These policies include expectations for hiring protocols, mandatory training, use of technology, appropriate conduct, reporting responsibilities and more.

**SECTION: Employee & Student Welfare  
POLICY: Non-Discrimination Statement  
POLICY #: 2.01**

**Non-Discrimination Statement**

Lydia Patterson prohibits discrimination, including harassment, against any employee or student. Discrimination is defined as conduct directed at an employee or student based on race, color, gender, national or ethnic origin, age, disability, or any other legally protected status applicable to Lydia Patterson, that adversely affects the employee's employment or student's educational decision or benefit.

**Employee, Volunteer, and Student Training**

Employees and overnight trip volunteers complete mandatory training each year including but not limited to harassment, bullying, and sexual harassment. Lydia Patterson Institute administration determines the required courses and tracks completion. Lydia Patterson Institute administrators also assign and track required student training for applicable grade levels.

**Anti-Harassment and Bullying**

Lydia Patterson prohibits all forms of sexual misconduct, discrimination, harassment and bullying including conduct that violates any applicable law or conduct that may not necessarily be unlawful but is determined to be inconsistent with the provisions of this policy or other applicable school policies. Submission to such policy is made either explicitly or implicitly as a term or condition of an individual's employment or a student's enrollment status.

Harassment involves physical, verbal, or non-verbal conduct that denigrates or shows hostility toward an individual because of his/her identity with regard to race, color, religion, gender, national or ethnic origin, age, disability, political beliefs, any other distinguishing physical or personality characteristics, or any other characteristic protected by law.

Prohibited harassment includes not only harassing behavior by another employee or student, but also harassment by a third-party such as a vendor, parent or volunteer. Harassing conduct may:

- Have the purpose or effect of unreasonably interfering with the individual's work or educational performance.
- Create an intimidating, threatening, hostile, or offensive environment; or
- Otherwise adversely affects the individual's performance, environment, or opportunities.

Bullying is an act of aggressive behavior in order to intentionally hurt another person. Bullying is frequently a persistent, focused, and targeted pattern of behavior resulting in pain or distress to the target. Bullying usually involves a perceived imbalance of power between the bullying child/adult and the child/adult being bullied.

**Types of bullying include:**

- **Verbal** - using words to threaten, tease, or harm
- **Physical** - using physical force such as tripping, hitting, pushing, or damaging/taking belongings
- **Emotional** - repeatedly harassing, tormenting, laughing at, and embarrassing
- **Social/Relational** - intentionally harming reputation and relationships by excluding, spreading rumors, gossip, or rallying others to tease or harm
- **Cyberbullying** - using electronic information and communication devices to send hurtful messages, images, spreading rumors on the internet, social media, cell phone, etc.

**SECTION: Employee & Student Welfare**  
**POLICY: Sexual Harassment**  
**POLICY #: 2.02**

**Sexual Harassment**

Sexual harassment is a serious issue that should be addressed in every workplace. It is not limited to verbal conduct, including sexual advances, requests for sexual favors, suggestive comments, innuendo, insults, offensive humor, jokes, propositions, or threats. Nonverbal conduct such as obscene gestures, printed material, leering, ogling, or offensive online content, as well as physical conduct like unwelcome touching, patting, pinching, or brushing the body, are also considered sexual harassment. It is important to note that sexual harassment is not necessarily limited to conduct that is sexual in nature - it also includes harassment based on gender. Gender-based harassment, which is also prohibited, is conduct that would not occur except for the gender of the person involved. It is the responsibility of every employee to take a resolute stance against this issue and ensure that the workplace remains free of harassment and discrimination of any kind.

**SECTION: Employee & Student Welfare**  
**POLICY: Employee-Student Communication**  
**POLICY #: 2.03**

## **Employee-Student Communication**

Communication within Lydia Patterson Community is an integral part of building relationships. The following communication policies apply:

### **General Communication**

- Employees and students should maintain appropriate communications, following all Lydia Patterson Institute policies.
- Employees shall limit electronic communications with students to matters within the scope of their professional responsibilities (e.g., for teachers, matters relating to class work, homework, and tests; for staff with extracurricular duty, matters relating to the extracurricular activity).
- Avoid promising to keep students' secrets; all LPI employees are mandated to report observed or suspected child abuse or neglect, as required by law.
- **Note:** Employees do not have a right to privacy with respect to communications with students and parents.

### **Text Messaging**

- Refrain from sending text messages to individual students. Group texts (WhatsApp) are allowed for professional communication of a timely manner only with prior approval of HR/President. Otherwise, email is preferred.

### **Email**

- Employees shall use their Lydia Patterson email address rather than personal email addresses to communicate with students and families.
- All communication through electronic media with parents and students must be professional and of the appropriate nature, purpose, timing, and amount.

### **Social Media**

Employees are prohibited from having social media relationships such as “friending”, “following”, or messaging with current students or alumni under age 18. The only exception to this rule is that teachers may have social media pages and accounts that are used exclusively for the class they are teaching.

### **Adult-Student Professional Boundaries**

Building relationships is a Lydia Patterson core value. In building Christ-centered relationships of trust with students, employees and volunteers shall remain uncompromised in their Christian, legal, and ethical responsibilities. The following applies to all:

- Promote and maintain an atmosphere in which students are encouraged to be Christ-like.
- Help all students to take personal responsibility for their behavior.
- Invest in a personal knowledge of students through mentoring, discipling, and guidance on a daily basis.
- Be appropriately invested, referring students to administrators for deeply personal or mental health issues.
- Avoid preferential treatment to any one student.
- Maintain appropriate professional boundaries with students. Personal relationships of an intimate, emotional, physical, sexual, or other inappropriate nature between employees and students are strictly prohibited.
- Take affirmative steps to avoid compromising situations with students, including but not limited to being alone with individual students either on or off campus.

### **Interaction/Contact with Students**

In general, student interactions with adults should be readily interruptible and observable. This means that students interacting with an adult are or could be within hearing or visual range of another adult and/or other students whenever possible. The following applies to all:

- Physical contact with students should be minimal and only in the presence of other adults. Employees and volunteers may not have students sit on their lap or engage in physical actions including but not limited to tickling, wrestling, or roughhousing. Never touch a student in any way that could be interpreted in a sexual manner.
- At least two adults should be present whenever possible. If a teacher is alone with a student, the classroom door must be open or, if possible, engage another adult in the area until other students or adults arrive.
- Never host students in an employee's home, except (a) with approval from the principal, (b) in a group, (c) with parent approval, and (d) with another employee present.
- Never drive a student alone and never drive students without parent/guardian permission.
- Do not provide childcare for current Lydia Patterson Institute. Christian families or employ a current Lydia Patterson student(s) without prior written permission from the President/Head of School. Never remain at a home alone with a student if a student is employed as a babysitter or in some other capacity.

### **Restroom/Locker Room Procedures**

- Adults should use the adult only restrooms located in most major buildings on campus.
- Adults should avoid being alone with a student in the restroom.
- It is strongly recommended when taking children to the restroom that adults take children of their same gender. Provide as much privacy as possible and only enter a bathroom stall to assist a child when absolutely necessary, keeping the door open.

- Personal electronic devices with video/picture capabilities such as cell phones, smartwatches, cameras or video recorders should NEVER be used in bathrooms or locker rooms.
- Coaches should never dress, shower, or use the restroom in the student's locker room.
- For more locker room guidelines, see the Coaches Athletic Handbook.

### **Overnight Trips**

On overnight trips, employees and volunteers are not permitted to enter a student's hotel room, cabin or tent. For room checks or an emergency situation, employees are required to leave the door of the student's hotel room open at all times. In addition, coaches and trainers will not use their hotel room, cabin, or tent to conduct meetings or provide treatment at any time.

Lydia Patterson parents may be asked to serve as chaperones. All chaperones must have a background check on file with the school and must also complete chaperone training. For more information, see the Overnight Trip/Event Policy.

**SECTION: Employee & Student Welfare  
POLICY: Response & Reporting  
POLICY #: 2.04**

**Response and Reporting Procedures**

Anyone, whether student, employee, volunteer, or family member who witnesses, or has knowledge of an incident of harassment, bullying, sexual misconduct, or other inappropriate behavior MUST report the incident immediately according to the following procedures:

**Students**

Report incidents immediately to a Principal or Administrator. When providing information or reporting an incident, be very clear and truthful. It is a serious matter to bring allegations of misconduct against another person.

**Employees and Volunteers**

Lydia Patterson's employees and volunteers have an affirmative duty to promptly report any situation that could constitute sexual misconduct, harassment, bullying, abuse, or neglect of students to a Principal or Administrator. Additional reporting requirements are required if related to child abuse/neglect. (Refer to section Allegations of Child Abuse/Neglect) It is important to understand the signs of these behaviors in order to act quickly.

**Discrimination/Harassment**

Any employee of Lydia Patterson Institute who feels he or she has been or is being subjected to or has witnessed discrimination or harassment from anyone must immediately bring this to the attention of Lydia Patterson Institute Administration, including, without limitation to Human Resources. Persons to whom an employee can report include the President/Head of School, and Principal. An employee is not required to make an initial report to any particular one of these administrators rather an employee can report as the employee chooses.

**Sexual Misconduct/Inappropriate Behavior**

An internal report must be filed (see next section) and/or appropriate authorities as indicated in section entitled 'Allegations of Child Abuse/Neglect,' if an employee or volunteer becomes aware of or witnesses an inappropriate adult-student interaction or if they become aware of interactions that appear inappropriate. Also, if an employee or volunteer experiences a situation in which a student becomes overly friendly or acts inappropriately, they shall leave the situation and immediately consult a principal or direct supervisor for guidance.

**Retaliation Prohibition**

Lydia Patterson prohibits retaliation against an employee, volunteer, or student who, in good faith, makes a claim alleging sexual misconduct, harassment, bullying,

abuse or neglect of students or another employee. There shall not be retaliation for anyone who serves as a witness or otherwise participates in an investigation.

### **Investigations**

Reports concerning harassment, bullying, sexual misconduct, or other inappropriate behavior will be investigated in a timely manner that respects the dignity and privacy of those involved.

The investigation must include documented interviews of the victim, alleged perpetrator, and witnesses. Each individual must be interviewed separately and at no time will the alleged perpetrator and victim be interviewed together. Lydia Patterson Institute may notify a student's parent or appropriate government officials at its discretion.

All interviews, allegations, statements, and identities will remain confidential to the extent possible and allowed by the law. All investigations shall produce a final report to be kept on file. Based on the investigation outcome, the appropriate disciplinary or other action will be taken.

### **Allegations of Child Abuse/Neglect**

Texas law broadly defines "abuse" and "neglect" so that every action in which a child's physical or mental health or welfare has been or may be adversely affected is potentially covered; it excludes an accident or reasonable discipline by a parent or guardian that does not expose the child to a substantial risk of harm. The Texas Family Code requires: that *ANYONE* with knowledge of *SUSPECTED CHILD ABUSE OR NEGLECT* must report to it to the *APPROPRIATE AUTHORITIES*. According to state law, educators and other professionals must make the report immediately but no later than the 48 hours after first suspecting a child has been abused or neglected. This cannot be delegated to another person to make the report.

Failure to report suspected child abuse, including sexual abuse, neglect and inappropriate relationships between teacher and students, is a crime and may result in prosecution as a misdemeanor or felony.

Under state law, any person reporting in good faith or assisting in the investigation of a reported child abuse or neglect allegation is immune from criminal or civil liability.

As professional reporters, it is important for educators and other LPI employees to remain informed on the signs of child abuse. Lydia Patterson Institute will annually, or any time upon request, provide employees training on child abuse and their reporting obligations.

Follow these steps when reporting allegations of child abuse or neglect.

1. Immediately share information with Supervisor (if time permits). Supervisor will notify the President/Head of School.

2. Determine whether the reports needs to be made to Law Enforcement or The Department of Family and Protective Services (DFPS)
  - a. (If the alleged perpetrator is the person responsible for a child's care, custody, or welfare then report to DFPS, otherwise report to local law enforcement.)

The Hotline must be called rather than reporting online if the following situations exists:

- The alleged victim faces immediate risk of abuse or neglect that could result in death or serious harm.
- There is a need for immediate medical treatment.
- There is alleged sexual abuse where the alleged perpetrator will have access to the victim within the next 24 hours.
- Anytime an injury is to a child age 5 and younger or a child under age 5 is likely to be left alone.
- Anytime you believe the situation requires action in less than 24 hours.

If reported to DFPS via the hotline get:

1. CALL ID #
2. Intake worker's NAME and ID.

If reported to DFPS online obtain and document:

1. The ONLINE REPORT CONFIRMATION (a system generated number acknowledging that DFPS received the information via email).
2. The REPORT IDENTIFICATION NUMBER (The number DFPS uses to track the information you submitted in the system AFTER an intake worker has reviewed and assessed it. You will get this number in an email that is sent back to you.)

If there is an immediate safety concern and the local CPS office has not contacted you prior to release of the student, call local law enforcement or 911.

*In addition, according to the Texas Family Code, employees must cooperate with investigators of child abuse and neglect. Interference with a child abuse investigation by denying an interviewer's request to interview a student at Lydia Patterson Institute or requiring the presence of a parent or Lydia Patterson Institute administrator against the desires of the duly authorized investigator is prohibited. The DFPS investigator also has the right to take the child off campus for purposes of the investigation as long as they have ATTEMPTED to notify the parent.*

**SECTION: Employee & Student Welfare**  
**POLICY: Retaliation**  
**POLICY #: 2.05**

**Retaliation**

Lydia Patterson Institute is firmly committed to fostering a work environment that is free from any form of unlawful retaliation and will not tolerate any acts of retaliation against any of its employees. Retaliation is deemed to have occurred when an employee engages in any form of protected activity and subsequently experiences a materially adverse employment action as a consequence of such activity. Protected activities may include, but are not limited to, the reporting of any unlawful and discriminatory practices, or any other acts that violate Lydia Patterson Institute's policies and procedures. It is the Institute's policy to ensure that all employees are aware of their rights and responsibilities in this regard and that any allegations of retaliation are promptly investigated and addressed in accordance with the Institute's established procedures.

## **SECTION 3: STANDARDS OF CONDUCT**

Lydia Patterson Institute employees share responsibility for observing certain standards of conduct. These standards emphasize personal and professional integrity in all activities. Generally, treating others with the respect and consideration with which you expect to be treated and maintaining open, ongoing communication with your supervisor and associates will create the basis for a successful work experience.

Lydia Patterson Institute expects high standards of conduct, honesty and integrity from its employees. Employees are expected to act with the highest standards of integrity and ethical conduct in all matters. Employees should also act in a manner that is consistent with and supports Lydia Patterson Institute's mission and values.

Employees should always be aware of their high visibility to the public and, therefore, conduct themselves professionally and ethically. They should avoid all situations that may reflect negatively on themselves, fellow employees or the school.

All employees are expected at all times to conduct themselves in a Christ-like manner so as to promote the best interest of Lydia Patterson Institute. It is essential that the integrity and trust of the student/adult relationship is maintained at all times. Such conduct includes but is not limited to:

- Reporting to work punctually as scheduled and being at proper workstation, ready for work, at the assigned starting time.
- Giving adequate advance notice whenever unable to work or report on time.
- Complying with all Lydia Patterson Institute's safety and security practices and policies.
- Abstaining from the use of tobacco products or alcohol on campus or during any time when supervising students, whether on campus or off campus. See Drug Free Work Place.
- Keeping work area and the school in general clean and orderly.
- Treating all children, volunteers, parents and fellow employees in a courteous manner.
- Refraining from offensive or undesirable behavior which is contrary to Lydia Patterson Institute Christian's policies.
- Performing assigned tasks efficiently and in accordance with quality standards.
- Keeping grade book and lesson plans up to date.
- Meeting deadlines.
- Maintaining appropriate professional boundaries with students at all times.

### **Prohibited Conduct**

The following are examples of conduct prohibited and may subject the individual involved to disciplinary action, up to and including termination. This list is not

comprehensive as there are other behaviors that can lead to discipline as well as immediate termination.

- Working while under the influence of alcoholic beverages.
- Inappropriate behavior or excess alcohol consumption at Lydia Patterson Institute sponsored events.
- Engaging in the illegal use, sale, dispensing, or possession of a drug at anytime and anywhere, either on or off duty.
- The use of profanity or abusive language.
- The possession of firearms or other weapons anywhere on Lydia Patterson Institute Christians' premises.
- Insubordination or the refusal; directly or indirectly, by an employee to follow supervisors' instruction concerning a job-related matter.
- Fighting or assault of any kind.
- Threatening of administration, supervisors, parents, children, or fellow employees.
- Theft, destruction, defacement, or misuse of Lydia Patterson Institute property or of another employee's or student's property.
- Falsifying or altering any Lydia Patterson Institute records or reports, such as, but not limited to an application for employment, medical records, student records, an absentee record, a time record, expense records, or shipping and receiving records.
- Improper disclosure of confidential information, including without limitation, confidential student, parent or donor information.
- Behavior on or off the job that is inconsistent with Lydia Patterson Institute's mission and values or that may damage the reputation of Lydia Patterson Institute.
- Engaging in an improper relationship with a student.
- Engaging in any form of sexual misconduct including, but not limited to an improper relationship with a co-worker, or sexual harassment.

The best working conditions prevail when people conduct themselves with respect and consideration for each other and observe reasonable rules and regulations of personal and professional behavior. Lydia Patterson Institute expects all of its activities and the activities of its employees and agents to be legal, ethical and otherwise proper. It is each employee's responsibility to alert management immediately about any illegal, unethical or otherwise improper activity. If such a report is made in good faith, Lydia Patterson Institute will protect the reporting employee from retaliation or any other detrimental action.

All employees should read and follow our company policies. If they have any questions, they should ask their supervisors or HR/President.

All employees must protect our Lydia Patterson Institutes legality. They should comply with all environmental, safety and fair dealing laws. We expect employees to be ethical and

responsible when dealing with our Lydia Patterson Institute's finances, products, facilities, partnerships and public image. All employees should treat our Lydia Patterson Institute's property, whether material or intangible, with respect and care

Employees:

- Shouldn't misuse Lydia Patterson Institute equipment or use it frivolously.
- Should respect all kinds of incorporeal property. This includes trademarks, copyright and other property (information, reports etc.) Employees should use them only to complete their job duties.

Employees should protect Lydia Patterson Institute facilities and other material property (e.g. school vehicles) from damage and vandalism, whenever possible.

At Lydia Patterson Institute, professionalism is not optional—it is a core expectation. All employees represent not only themselves but also the mission, values, and reputation of our school. Each staff member must demonstrate integrity, respect, and excellence in their words, actions, and performance.

Professionalism encompasses the following areas:

#### 1. Job Duties and Authority

- Employees are expected to fulfill their job responsibilities diligently, accurately, and with integrity.
- Supervisors and managers must exercise their authority fairly, without favoritism, misuse of power, or disregard for established procedures.
- Employees are required to follow supervisor directives promptly and respectfully. Failure to comply with legitimate instructions may be considered insubordination and will result in corrective action.
- Team members should complete their duties with competence, initiative, and timeliness. Excuses, avoidance of responsibility, or shifting tasks to others without approval will not be tolerated.
- Mentorship, teamwork, and a willingness to assist others are strongly encouraged throughout our school.

#### 2. Professional Conduct and Representation

- Employees are expected to speak positively and respectfully about our school, colleagues, and students in all settings—both on and off campus. Disparaging remarks, gossip, or negativity that harms the reputation of the school will be considered unprofessional conduct.
- All communications—whether verbal, written, or electronic—must reflect the values and mission of Lydia Patterson Institute. This includes interactions with parents, students, donors, board members, and the broader community.
- Employees must maintain composure and professionalism when addressing conflict or disagreement. Disrespectful behavior, public criticism of leadership, or divisive attitudes that undermine unity will not be tolerated.

#### 3. Use of Benefits and Resources

- Employees are entrusted with certain benefits (such as time off, insurance, use of facilities, and subscriptions). Abuse or misuse of these benefits will result in disciplinary measures.
- Lydia Patterson Institute resources, including property, funds, equipment, and technology, must be used responsibly and only for work-related purposes.

#### 4. Attendance, Punctuality, and Time Management

- Employees are expected to adhere to established schedules and maintain reliable attendance.
- Absenteeism and tardiness disrupt the school community and will be addressed promptly.
- While allowances may be made for emergencies or approved absences, repeated lateness or absences without proper communication are unacceptable.

#### 5. Personal Appearance

- All employees must comply with the school's dress code and grooming standards.
- Appearance should reflect professionalism, modesty, and respect for our faith-based environment.

#### 6. Collaboration and Workplace Relationships

- Employees are expected to maintain a spirit of cooperation, respect, and collegiality.
- Behaviors that disrupt teamwork, create hostility, or foster division within the school community are inconsistent with our professional standards.
- Staff must refrain from conversations that negatively target colleagues, leadership, or the school's mission.

#### 7. Communication Standards

- Employees are to maintain open, respectful, and timely communication with colleagues, supervisors, students, and parents.
- Confidential information must be safeguarded and only shared with those who have proper authority.
- Professional tone and language must be used in all communication, both internal and external.

#### 8. Ethical Standards

- Corruption, bribery, or any form of unethical gain is strictly prohibited.
- Employees must avoid conflicts of interest that compromise judgment, duties, or the integrity of the school.
- Employees may not solicit or accept inappropriate gifts, favors, or compensation from families, vendors, or partners.

#### 9. Consequences for Unprofessional Conduct

Lydia Patterson Institute reserves the right to take disciplinary action when employees fail to uphold these standards of professionalism.

Violations may include, but are not limited to:

- Insubordination (refusal to follow supervisor directives).
- Disparaging or damaging remarks about the school, colleagues, or leadership.
- Unprofessional conduct with students, parents, or stakeholders.
- Repeated tardiness or absenteeism.
- Neglect of assigned duties or responsibilities.
- Misuse of school resources, benefits, or authority.
- Breach of confidentiality or unethical behavior.

**Possible Disciplinary Actions** (depending on severity and frequency):

- Verbal or written reprimand.
- Formal probation.
- Demotion.
- Suspension.
- Termination of employment.

In cases of corruption, theft, embezzlement, harassment, discrimination, or other unlawful behavior, the school may also pursue legal action.

**SECTION: Standards of Conduct**  
**POLICY: Addressing Conflicts & Disputes**  
**POLICY #: 3.01**

**Addressing Conflicts and Disputes**

*“If your brother sins against you, go and show him his fault, just between the two of you. If he listens to you, you have won your brother over. But if he will not listen, take one or two others along, so that every matter may be established by the testimony of two or three witnesses.” Matthew 18: 15-16*

It is the obligation and responsibility of each employee at Lydia Patterson to work on resolving problems and conflicts by focusing on solutions, keeping issues work-related (as opposed to personal), and communicating directly with the person or persons with whom they have a conflict. All employees should settle all conflicts in a Christ-honoring way and always follow and insist that others follow the principles of reconciliation found in the Matthew 18 Principle.

The employee agrees that all differences are to be resolved by utilizing Christ-principles always presenting a united front. Gossip of any kind will not be tolerated because of the damage gossip does to relationships, reputations and one’s self-esteem.

In the event the situation is not resolved, bring it to your supervisor. The Board has delegated to the President/Head of School the authority to operate the school on a day-to-day basis. The Board does not involve itself in resolving conflicts and asks employees and parents not to call Board members into school-related issues. Grievances will only be taken to the Board when all internal chain of command has been exhausted.

In the case of actual or potential harassment or other discrimination prohibited under Lydia Patterson policies or in the case of any unlawful or potentially unlawful conduct or any violent or potentially violent threats or behavior, no employee should attempt to resolve such a matter on his or her own, but rather should immediately report the concern to a supervisor, or administrator HR/President/Head of School.

**Matthew 18 Principle**

In addressing concerns, all employees adhere to and require parents to adhere to the following steps taken from the *The Matthew 18 Principle for Solving School Problems* by Dr. Paul A. Kienel:

1. **Keep the matter confidential.** Share only with those directly involved and respect confidentiality (Proverbs 11:9). Do not involve other parents or Lydia Patterson personnel.
2. **Keep the circle small.** Person-to-person problems are usually solved at the two-person level. Be straightforward and lovingly forthright.
3. **Be forgiving.** Once the matter is resolved, wholeheartedly forgive and restore the person who has offended you (Galatians 6:1). Close your meeting in prayer.

4. **Seek assistance.** If both parties agree that you have been unable to resolve the concern, then share the matter with the appropriate school administrator. Meet together, parent, teacher, and appropriate school administrator, in a spirit of prayer and humility, willing to submit to the Lord's will in the matter and also willing to submit to reproof and correction if needed. An open and honest discussion and submission to godly principles will most likely result in an amiable solution.
5. **Accept final resolution.** If further intervention is deemed necessary, all parties concerned will be required to meet together for a final resolution with a member of the senior administration.

Additionally, employees are expected to keep their language above reproach. No form of profanity will be tolerated. No disrespectful speech to other employees, parents, or children is acceptable. Tone of voice should always be kept at a respectable level and all employees should remember that all children are a gift from God and should be spoken to as such.

*Everyone should be "quick to listen, slow to speak and slow to become angry." James 1:19*

**SECTION: Standards of Conduct**  
**POLICY: Confidentiality Agreement**  
**POLICY #: 3.02**

**Confidentiality Agreement**

It is the policy of Lydia Patterson Institute to protect the confidentiality of sensitive information related to Lydia Patterson Institute, students, faculty, and employees. Through the course of employment with Lydia Patterson Institute, employees may have occasion to use, access, or to otherwise acquire confidential information. As a condition of employment, all employees agree to protect any such confidential information.

Confidential information includes but is not limited to:

- Education records, or information in education records, pertaining to students
- Disciplinary records, or information contained therein, pertaining to students
- All information contained in an individual employee's or applicant's personnel files
- Any medical records or other medical information related to employees or students
- Any information pertaining to a grievance or disciplinary action concerning an employee
- Any information or knowledge, formal or informal, regarding any student or employee's behavior or academic or professional accomplishments or deficiencies that is not general knowledge or would cause harm or embarrassment outside of normal operating and academic processes
- Any confidential information about Lydia Patterson Institute, its practices, faculty, employees or students/families
- Any information the disclosure of which would cause an embarrassment to an employee, student or Lydia Patterson Institute. Employees must hold all confidential information in the strictest confidence and not disclose or otherwise utilize confidential information except as necessary to perform his or her customary and regular job duties or as required by law. This means that employees will:
  - Only access confidential information for which they have a legitimate business need to know.
  - Not in any way disclose, divulge, copy, release, review, alter or destroy any of Lydia Patterson Institute's confidential information except as properly authorized within their employment with Lydia Patterson Institute; and
  - Not otherwise misuse or misappropriate Lydia Patterson Institute's confidential information.
- Prevent unauthorized use of confidential information and immediately report the misuse of any accidental disclosure of confidential information to their immediate supervisor.
- If an employee has any doubt as to whether any information is confidential or whether any information should be disclosed, he or she shall request clarification from his or her immediate supervisor.

- Not discuss confidential information in or outside the workplace with any individual or organization that does not have a valid business reason to have access to this information.

We designed our company confidentiality policy to explain how we expect our employees to treat confidential information. Employees will unavoidably receive and handle personal and private information about students, parents and our school. We want to make sure that this information is well-protected.

We must protect this information for two reasons. It may:

- Be legally binding (e.g. sensitive customer data.)
- Constitute the backbone of our business, giving us a competitive advantage (e.g. business processes.)

This policy affects all employees, including board members, investors, contractors and volunteers, who may have access to confidential information.

Confidential and proprietary information is secret, valuable, expensive and/or easily replicated. Common examples of confidential information are:

- Unpublished financial information
- Data of students/parents/vendors
- Patents, formulas or new technologies
- Customer lists (existing and prospective)
- Data entrusted to our school by external parties
- Pricing/marketing and other undisclosed strategies
- Documents and processes explicitly marked as confidential
- Unpublished goals, forecasts and initiatives marked as confidential

Employees may have various levels of authorized access to confidential information.

What employees should do:

- Lock or secure confidential information at all times
- Shred confidential documents when they're no longer needed
- Make sure they only view confidential information on secure devices
- Only disclose information to other employees when it's necessary and authorized
- Keep confidential documents inside our company's premises unless it's absolutely necessary to move them

What employees shouldn't do:

- Use confidential information for any personal benefit or profit
- Disclose confidential information to anyone outside of our company
- Replicate confidential documents and files and store them on insecure devices
- When employees stop working for our company, they're obliged to return any confidential files and delete them from their personal devices.

We'll take measures to ensure that confidential information is well protected. We'll:

- Store and lock paper documents
- Encrypt electronic information and safeguard databases
- Ask employees to sign a non-disclosure agreements (NDAs)
- Ask for authorization by senior management to allow employees to access

certain confidential information

Confidential information may occasionally have to be disclosed for legitimate reasons.

Examples are:

- If a regulatory body requests it as part of an investigation or audit
- If our school examines a venture or partnership that requires disclosing some information (within legal boundaries)
- In such cases, employees involved should document their disclosure procedure and collect all needed authorizations. We're bound to avoid disclosing more information than needed.

Employees who don't respect our confidentiality policy will face disciplinary and, possibly, legal action.

We'll investigate every breach of this policy. We'll terminate any employee who willfully or regularly breach our confidentiality guidelines for personal profit. We may also have to punish any unintentional breach of this policy depending on its frequency and seriousness. We'll terminate employees who repeatedly disregard this policy, even when they do so unintentionally.

This policy is binding even after separation of employment.

**SECTION: Standards of Conduct**  
**POLICY: Conflict of Interest**  
**POLICY #: 3.03**

**Conflict of Interest**

Lydia Patterson Institute employees shall not derive any personal profit or gain, directly or indirectly, by reason of his or her participation with Lydia Patterson Institute. Each individual shall disclose to Lydia Patterson Institute any personal interest, which he or she may have in any matter pending before Lydia Patterson Institute and shall refrain from participation in any decision on such matter.

The Conflict of Interest Policy enables individuals to identify, evaluate, and address any real, potential, or apparent conflicts of interest that might, in fact or in appearance, call into question their duty of loyalty to Lydia Patterson Institute.

The relationship of the school with its employees should be based on mutual trust. As the school is committed to preserve the interests of people under its employment, it expects them to act only towards its own fundamental interests.

Conflict of interest may occur whenever an employee's interest in a particular subject may lead them to actions, activities or relationships that undermine the school and may place it to disadvantage.

This situation may take many different forms that include, but are not limited to, conflict of interest examples:

This situation may take many different forms that include, but are not limited to, the following examples:

- Employees' or board members' ability to use their position with Lydia Patterson Institute to their personal or professional advantage.
- Employees or board members engaging in activities that bring direct or indirect profit to a competitor.
- Employees or board members owning shares or financial interests in a competitor's organization.
- Employees or board members using connections obtained through Lydia Patterson Institute for their own private purposes.
- Employees or board members acting in ways that may compromise Lydia Patterson Institute's legality.
- Board members leveraging their role at Lydia Patterson Institute to advance their own professional interests, secure business contracts, or obtain benefits for themselves, their family, or associates.
- Employees or board members engaging in behavior or communication that damages Lydia Patterson Institute's reputation or public image for their own personal, professional, or financial benefit.

The possibility that a conflict of interest may occur can be addressed and resolved before any actual damage is done. Therefore, when an employee or board member understands or suspects that a conflict of interest exists, they should bring this matter to the attention of management so corrective actions may be taken. Supervisors must also keep an eye on potential conflict of interests of their subordinates.

The responsibility of resolving a conflict of interest starts from the immediate supervisor and may reach senior management. All conflicts of interest will be resolved as fairly as possible. Senior management has the responsibility of the final decision when a solution cannot be found.

In general, employees are advised to refrain from letting personal and/or financial interests and external activities come into opposition with the company's fundamental interests.

In cases when a conflict of interest is deliberately concealed or when a solution cannot be found, disciplinary action may be invoked up to and including termination.

This policy sets forth standards of conduct that shall apply to all staff, faculty, administration, and employees (collectively, "Employees") of Lydia Patterson Institute. As well as board members. LPI prohibits employees from engaging in any activity, practice or act that conflicts with the school's interest. Specific conflict of interest examples are listed below.

Employees must scrupulously avoid these situations and any similar circumstances that create an actual conflict of loyalty or interest or even the appearance of such a conflict.

#### Guidelines

- No employee shall accept full-time, part-time, or temporary employment in any organization which conducts business with the school.
- If an employee or a member of the employee's family has a financial interest in a firm that does business with the school, the employee must report the interest to the President and must not represent the school in such transactions.
- No employee or member of the employee's family shall accept gifts from any person or firm doing, or seeking to do, business with the school. Such gifts should be returned with an explanatory note. Token gifts valued less than \$50 is excluded from this policy.
- No employee shall directly or indirectly give, offer or promise anything of value to any representative of any vendor in connection with any transaction or business that the school may have with that vendor.

When an Employee becomes aware of a situation that could be seen as a conflict of interest, they shall have a duty to take the following actions:

- Immediately disclose the existence and circumstances of such situation to the President of Lydia Patterson Institute;
- Refrain from using their personal influence to encourage Lydia Patterson Institute to enter into a transaction; and

- Physically excuse themselves from participation in any discussions regarding the transaction with other employees of Lydia Patterson Institute, except to respond to requests for information.

Update such Declaration as necessary to reflect changes during the course of the year.

Lydia Patterson Institute may enter into a Covered Transaction if the President and the Board of Trustees President acting without the participation of the involved Employee, determines that such transaction is fair and reasonable to Lydia Patterson Institute.

The President may seek advice from outside advisors in connection with the review of any proposed Covered Transactions or with the administration of this policy.

Failure to adhere to these guidelines, including failure to disclose any actual or potential conflicts, may result in disciplinary action up to and including termination.

This policy is intended to supplement, but not replace, any applicable provisions of civil law, or Lydia Patterson Institute Code of Ethics that relate to conflicts of interest.

**LYDIA PATTERSON INSTITUTE  
CONFLICT OF INTEREST DECLARATION**

Lydia Patterson Institute requires each of its staff, faculty, administration, and employees (collectively, "Employees") to annually:

- (1) Review Lydia Patterson Institute Conflict of Interest policy;
- (2) Disclose any possible personal, familial, or business relationship that could reasonably give rise to a conflict of interest or the appearance of a conflict of interest; and
- (3) To acknowledge by their signature that they are acting in accordance with the letter and spirit of the policy.

Please respond to the following questions to the best of your knowledge (use additional pages if necessary).

1. Are you aware of any current or proposed transactions between Lydia Patterson Institute and you, a Family Member<sup>1</sup>, a Friend or an Affiliated Entity<sup>2</sup>? If yes, please describe. Yes  No

\_\_\_\_\_

2. Are you aware of any other relationships, arrangements, transactions, or matters involving Lydia Patterson Institute that could create a conflict of interest or the appearance of a conflict of interest? If yes, please describe.  
Yes  No

\_\_\_\_\_

3. Please list your Affiliated Entities (if any).

\_\_\_\_\_

I affirm that I have read and understand Lydia Patterson Institute Conflict of Interest Policy. I am currently, and agree to remain, in compliance with this policy.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Printed Name

\_\_\_\_\_  
<sup>1</sup> "Family Member" means an ancestor, spouse, sibling, child, grandchild, great-grandchild, or spouse of a sibling, child, grandchild or great-grandchild.  
<sup>2</sup> "Affiliated Entity" means a corporation, partnership or other entity of which the Constituent is an officer, director, trustee, employee, or more than 10% owner (individually or with one or more Family Members and/or other Affiliated Entities).  
<sup>3</sup> "Covered Transaction" means any business or financial transaction between Lydia Patterson Institute and a Personnel, or between Lydia Patterson Institute and a Family Member or Affiliated Entity of an Employee; or  
a. any other transaction, if the Employees ability to evaluate the transaction would be, or could reasonably appear to be, influenced by the Employee's existing (or potential) financial or personal interest.

**SECTION: Standards of Conduct**  
**POLICY: Work Schedules**  
**POLICY #: 3.04**

**Work Schedules**

All LPI employees are required to be punctual and be at their duty station no later than the time they were appointed and leave no earlier than appointed, unless they have permission from their supervisor. Upon arrival, any employees who are not on duty elsewhere will get ready for the day in their classrooms or offices.

The standard work week for non-exempt employees consists of 40 hours, working eight (8) hours daily. Non-exempt employees will be compensated on an hourly basis. They must sign in and out through the school program, PRAXI, to document their weekly hours worked for proper compensation.

Salaried exempt employees often applies to professional, administrative, and managerial positions. These roles may involve a level of professional discretion that necessitates flexibility in work hours, decision-making authority, and leadership responsibilities. The workday lengths for exempt employees are primarily determined by their current workloads. Unlike non-exempt employees who are eligible for overtime pay, there is no legally defined limit on the number of hours salaried exempt employees can be required to work. The key factor in determining work hours for salaried exempt employees is the nature of their job duties. Exempt employees are typically expected to fulfill their job responsibilities regardless of the hours involved. Their responsibilities often require a commitment beyond the standard 40-hour workweek, and they may need to work as many hours as necessary to fulfill their roles effectively. Starting and ending times vary within departments, and each supervisor will determine the schedule for their department.

Faculty are expected to sign in at their assigned time, with exceptions for those faculty with duties. Fulfilling professional responsibilities will often require that teachers spend time outside of school hours. Such professional responsibilities include:

- Preparing for instruction of classes planning lessons;
- Consulting with students, grading assignments, completing paperwork;
- Improving communication with parents, including but not limited to, initiating contact with parents after or before school hours;
- Participating in curriculum development committees leading towards the improvement of the educational program;
- Attending staff meetings, including attending necessary professional development, provided by the district, to improve and maintain teaching skills;
- Supervising and directing co-curricular activities not specifically included in the district's co-curricular program; and
- Participating in such other activities that pertain to the school's educational program;
- All personnel are expected to attend all meetings duly called by their supervisors

- or President.
- Workshops and other training will be required from faculty outside the contracted workdays for the school year.

### **Faculty/Staff Development Days**

Lydia Patterson Institute will hold faculty/staff development days to enhance instruction and grow faculty and staff toward common goals. Attendance at faculty/staff development is required. In case of individual emergencies, the employee's supervisor may approve an absence. In this case, the employee will take a personal day to make up the required development with a supervisor-approved alternative development activity during off-school hours.

### **Faculty Planning Periods**

All teachers are assigned at least one planning period a day. This period is provided so the teacher will have a definite time during the school day to plan work, check papers, conduct parent conferences, conduct teacher-student conferences, and perform similar duties.

### **Student Assistance Periods (Tutoring)**

It is important that teachers are available at least 45 minutes twice a week to assist students who need extra help. Teachers must give the office and students a copy of the day(s) and time the teacher plans to be available to assist students whether during open periods or after school.

### **Supervisory/Duty Assignments**

Supervisory duties are to be taken seriously. Lunch and recess duty require monitoring students by walking around and remaining standing while on duty, carefully observing and being attentive to surroundings. Preventative, proactive measures such as this provide for a much safer environment for students. ON DUTY means to be at all times with the students for whom you are responsible. Furniture removed from the building to be used outside while on duty must be returned inside the same day. Teachers may also be asked to supervise student competitions or club meetings.

### **Summer Break**

All employees are expected to be available as needed during the summer months at mutually agreeable times.

### **Personal Property**

Employees are expected to exercise reasonable care to safeguard personal items of value brought to work. Such items should never be left unattended or in plain view. Lydia Patterson Institute does not assume responsibility for the loss or theft of personal belongings. Employees are advised not to carry large amounts of cash or other valuables with them to work.

**SECTION: Standards of Conduct**  
**POLICY: Modified Duties/Restricted**  
**Duties**  
**POLICY #: 3.05**

**Modified Duties/Restricted Duties**

When feasible, Lydia Patterson Institute may provide temporary modified work options for employees who have been medically restricted due to work-related injuries or illnesses. These opportunities are not guaranteed and are subject to the availability of appropriate assignments. Any such options will be tailored, when possible, to accommodate the nature of the injury or illness and the limitations prescribed by the treating healthcare provider.

While every reasonable effort may be made to place employees in suitable assignments, Lydia Patterson Institute is not obligated to create new positions or provide work that is not available. If appropriate modified duty is identified, employees may be assigned to these temporary roles within or outside their regular departments.

Compensation during temporary modified duty will be determined by the nature of the assignment, and the pay rate may be different from the employee's regular rate of pay.

**SECTION: Standards of Conduct**  
**POLICY: Faculty Absences/  
Substitute**  
**POLICY #: 3.06**

**Faculty Absences / Substitute**

Absences for faculty members are categorized as scheduled and unscheduled. Should a prolonged illness keep a teacher out of class, the teacher must update their supervisor by phone and email each day during the absence, unless a definite date of return has been provided.

Scheduled absences include planned personal leave, professional development, medical appointments, or other anticipated time away from school.

Faculty absence procedures are as follows: Scheduled Absences

1. Submit Leave Request Form for approval by appropriate supervisor at least 7 working days before leave. Once approved, also enter the substitute request.
2. When a substitute is located, an email confirmation notice will be received from supervisor.
3. Ensure that lesson plans, attendance rosters, and additional pertinent materials are available in a substitute folder kept in the classroom.
4. If a substitute is not confirmed within 24 hours of the absence date, the Administrator, Assistant Principal must then be contacted via email to cancel the absence.
5. Faculty must make sure there are not more than two (2) faculty members out.
6. Employee must not take time off:
  - Should NOT be taken during the first two weeks of the school year and the last two weeks before the end of the school year
  - Should NOT be taken during nine-weeks testing
  - Should NOT be taken during parent-teacher conferences
  - Should NOT be taken during open houses and special events
  - Should NOT be taken during professional development

Unscheduled absences include illness, emergencies, or unforeseen circumstances.

Unscheduled Absences

1. Call, text, or email supervisor about absence.
2. A substitute will be secured.
3. After substitute is secured email staff informing them of substitute's name.
4. If coverage is not found using the substitute list, email faculty for coverage. Email Administrators and staff giving details of coverage by period.
5. Supervisor must inform Business Office about teacher's absence.
6. Upon return, the faculty member must turn in leave form.

If a prolonged illness keeps a teacher out of class, the teacher must contact their

supervisor daily by both phone and email to provide an update, unless a definite date of return has already been established and communicated by medical documentation.

### **Appointments During the Workday**

Faculty are expected to schedule medical or personal appointments outside of the regular workday (7:30 a.m. – 4:30 p.m.) whenever possible.

- Scheduling appointments during the school day is strongly discouraged, as it creates unnecessary disruption and burden for other faculty.
- In the event of an unavoidable emergency, a faculty member must request half-day illness/emergency leave and follow the standard leave procedures.

### **Holiday and Critical Period Restrictions**

Time off immediately before or after a holiday, or during the first two or last two weeks of school, will only be granted in the event of a documented emergency involving the faculty member or their child.

- Approval will require appropriate documentation or evidence of a genuine family emergency provided upon return.
- For purposes of this policy, a “child” is defined as:
  - A legal dependent under the age of 18, or
  - A dependent over 18 with documented special needs or medical conditions requiring the care of the employee.

Accrual of time off will not continue during any Unpaid Leave. At termination of employment, employees will not be paid for any unused vacation days.

-

**SECTION: Standards of Conduct**  
**POLICY: Employees Absences**  
**POLICY #: 3.07**

**Employee Absences**

All LPI employees are expected to begin work on time as scheduled. All time off must be requested by the employee and be pre-approved by the supervisor. In the event of an illness, the individual should notify his/her supervisor and follow the process for an absence.

Scheduled absences include planned personal leave, professional development, medical appointments, or other anticipated time away from school.

Employees absence procedures are as follows: Scheduled Absences

1. Submit Leave Request Form for approval by appropriate supervisor at least 7 working days before leave.
2. Employee must submit Leave Request Form for any time that he or she will be out.
3. Employee must make sure there are not more than two (2) staff members out.
4. Should be taken during September 15 through July 15
5. Employee must not take time off:
  - Should NOT be taken during the first two weeks of the school year and the last two weeks before the end of the school year
  - Should NOT be taken during nine-weeks testing
  - Should NOT be taken during parent-teacher conferences
  - Should NOT be taken during open houses and special events
  - Should NOT be taken during professional development
  - Should be taken one (1) week at a time unless approved by supervisor and ratified by President.

Employees are encouraged to take their vacations within the same fiscal year during the following period --September 1 to July 15. Unused vacation days cannot be carried over to the following year.

Unscheduled Absences

1. Call, text, or email supervisor about absence.
2. If more than two (2) consecutive days of absence and required by supervisor, due to employee's pattern, employee must present doctor's note.
3. Supervisor must inform Business Office about absence.
4. Upon return, the employee must turn in leave form.

**Holiday and Critical Period Restrictions**

Time off immediately before or after a holiday, or during the first two or last two weeks of school, will only be granted in the event of a documented emergency involving the faculty member or their child.

- Approval will require appropriate documentation or evidence of a genuine family emergency provided upon return.
- For purposes of this policy, a “child” is defined as:
  - A legal dependent under the age of 18, or
  - A dependent over 18 with documented special needs or medical conditions requiring the care of the employee.

Accrual of time off will not continue during any Unpaid Leave. At termination of employment, employees will not be paid for any unused vacation days.

**SECTION: Standards of Conduct**  
**POLICY: Break and Meal Period**  
**POLICY #: 3.08**

**Break and Meal Period**

This policy applies specifically to auxiliary and non-instructional employees, including but not limited to administrative staff, office personnel, custodial and maintenance staff, food service workers, and other support services. It outlines expectations for lunch and break time during scheduled work hours.

**1. Meal Period**

- Employees are provided with one (1) 60-minute meal period each workday.
- During this time, employees must be fully relieved of all duties. If an employee is required to remain available for work during this time, the meal period will be paid.
- Employees are required to sign in and out using the Praxi system to accurately record the beginning and end of their meal period.
- Employees are expected to take their full 60-minute lunch hour each day. Skipping the lunch period to leave early is not permitted.
- Lunch hours may be adjusted by supervisors based on the operational needs of the school, including staff coverage, student supervision, and scheduled activities.

**2. No Additional Paid Breaks**

- LPI does not provide separate paid rest breaks during the workday.
- However, employees may use a portion of their 60-minute lunch period for brief rest or personal time, provided they remain within the allotted hour.
- If employees choose to take shorter segments of their meal period as breaks throughout the day (e.g., one 30-minute lunch and two 15-minute breaks), this must:
  - Be pre-approved by a supervisor,
  - Be properly signed in and out through the Praxi system, and
  - Be taken on campus—leaving campus during these breaks is not permitted without prior approval.

**3. Expectations and Professional Conduct**

- The 60-minute meal period may not be extended, shortened, or shifted without prior approval.
- Employees may not use break or lunch time to arrive late or leave early without authorization.
- Misuse of time—including failing to sign in/out, exceeding allotted time, or leaving campus during breaks without approval—may result in corrective action.

**4. Coverage and Supervision**

- Supervisors may stagger lunch schedules to ensure adequate coverage.
- Employees must coordinate any adjustments to their schedule or break usage with their supervisor in advance.

**SECTION: Standards of Conduct**  
**POLICY: Faculty & Staff General**  
**Communication**  
**POLICY #: 3.09**

**Faculty and Staff General Communication**

Lydia Patterson Institute (LPI) values clear, timely, and professional communication. All employees are expected to check and respond to communications consistently to ensure smooth school operations and effective collaboration.

**Mailboxes**

- Each faculty member is assigned a communication mailbox located in Principal's office.
- Faculty are responsible for checking their mailbox daily.
- The mailbox is intended strictly for communication purposes, not for storage. Materials should not be left in the mailbox for extended periods of time.

**Email Communication**

- All employees (faculty and staff) are assigned an official LPI email address. This account must be used for all school-related business and communication.
- Faculty and staff are required to check their email inbox daily during the school year and regularly during the summer months.
- Email should be used only for Lydia Patterson Institute business. Personal email accounts are not to be used for official school communications.
- Employees are expected to respond to school-related emails within a reasonable time frame (generally 24 hours during the school year).

**WhatsApp Communication**

- LPI top administration also utilizes WhatsApp groups or direct messages as an additional tool for quick, time-sensitive, or urgent communication (e.g., last-minute schedule changes, emergency alerts, or staff reminders).
- Employees are expected to check and respond to WhatsApp messages from official school groups or supervisors promptly, particularly during the school year.
- WhatsApp communication should remain professional, concise, and school-related. Personal or inappropriate use of official school groups is not permitted.

**General Expectations**

- Faculty and staff are responsible for staying informed by monitoring their mailbox, LPI email, and WhatsApp communications.
- Important announcements, policies, or directives may be communicated through any of these official channels, and failure to review them does not excuse lack of compliance.
- Employees are expected to maintain professional tone and etiquette in all forms of communication.

**SECTION: Standards of Conduct**  
**POLICY: Dress Code & Personal Appearance**  
**POLICY #: 3.10**

**Dress Code & Personal Appearance Policy**

All employees are expected to dress professionally in clothing that is clean, pressed, modest, and appropriate for the nature of work in their departments and projects the high standards of Lydia Patterson. It is expected that employees will maintain a clean and neat appearance and will project a professional, Christlike image.

**General Appearance Expectations**

- All employees must be clean, well-groomed, and appropriately dressed for their roles.
- Clothing must be neat, properly fitted, and free from rips, tears, or offensive graphics.
- All attire should reflect modesty, professionalism, and appropriateness to the work being performed.
- Staff are role models—first impressions matter. Appearance helps build credibility, maintain authority, and set a positive example for students.

**A professional appearance for women will include:**

- Dress pants/capris, skirts, blouses or dresses. Skirts/dresses must be of proper length (by the knee or below the knee).
- No tight or revealing clothing of any kind. Tank tops, yoga pants, leggings, or spandex-type materials are not permitted.
- No jeans or T-shirts (except for spirit wear or designated jeans days).
- Warm up/wind suits are not considered professional attire and should not be worn, with the exception of PE teachers.
- No crocs, plastic shoes, flip flops, or any slick bottom shoes or other type of footwear that is not safe on stairs, wet surfaces, etc. Sandals suitable for professional attire are permitted if they have a strap in the back.
- All visible tattoos must be covered while on campus. This includes during PE. If wearing shorts, you must wear leg sleeves to cover any tattoos on your legs. Likewise, arm sleeves must be worn to cover tattoos on your arms. Tattoos must remain fully concealed at all times while on campus.
- Piercings (other than earrings) may not be worn on campus.
- Hair should be clean, well-groomed, and styled in a manner that reflects professionalism and does not distract from the learning environment.
- Messy, unkempt, or disheveled hair is not acceptable, as it detracts from a professional appearance.
- Extreme hairstyles or unnatural colors are not permitted.
- Makeup and accessories must be subtle and professional.

**A professional appearance for men will include:**

- Slacks, a shirt with a collar, and dress shoes.
- No tight or revealing clothing of any kind. Tank tops, yoga pants, leggings, or spandex-type materials are not permitted.
- No jeans or T-shirts (except for spirit wear or designated jeans days).
- Warm up/wind suits are not considered professional attire and should not be worn, with the exception of PE teacher
- No crocs, plastic shoes, flip flops, or any slick bottom shoes or other type of footwear that is not safe on stairs, wet surfaces, etc.
- All visible tattoos must be covered while on campus. This includes during PE. If wearing shorts, you must wear leg sleeves to cover any tattoos on your legs. Likewise, arm sleeves must be worn to cover tattoos on your arms. Tattoos must remain fully concealed at all times while on campus.
- Piercings may not be worn on campus.
- Hair: Male faculty and staff are expected to maintain a neat, well-groomed appearance.
- Hair must be above the collar, neat, and well-groomed. Extreme styles are not permitted.
- Hair should not cover the eyes or radiate upward.
- Beards and mustaches must be neatly trimmed.

### **Summer Dress**

During summer months, employees should maintain a professional appearance; however, summer dress may be more casual as is appropriate to the task being performed. At all times, clothing should be modest and appropriately represent the high standards of Lydia Patterson.

### **Inappropriate Attire – Not Permitted for Any Staff**

- Caps or hats.
- T-shirts (outside of spirit days), jeans, sweats, jogging bottoms, short skirts, short shorts, sleeveless/skimpy/see-through tops, denim, or anything torn.
- Excessive jewelry, flashy accessories, nose or facial piercings.
- Any article of clothing or appearance deemed unprofessional by administration.

### **Footwear**

Professional and appropriate footwear must be worn at all times. For non-PE staff, tennis shoes or athletic shoes may be worn only if they are clean, in good condition, and coordinate with a professional outfit. Worn-out, or overly casual athletic shoes are not acceptable.

PE teachers, maintenance staff, and others in active roles may wear athletic shoes as part of their job duties, provided they are appropriate for safety and performance.

- Footwear must be safe for stairs and wet surfaces.
- Heels may not exceed three inches.
- Backless shoes are not permitted.
- Kitchen and maintenance staff must wear job-specific safety footwear.

**Unacceptable footwear for all staff includes:**

- Flip flops or beach sandals
- Crocs or plastic shoes
- House slippers or fuzzy slides
- Shoes with holes, heavy wear, or that pose a safety risk
- Open-toed shoes without a back strap

**Administrative Discretion and Enforcement**

All final decisions regarding appropriate attire are at the discretion of the Administration. Any employee in violation of this policy may be asked to take immediate corrective action, which could include leaving the premises to change. Repeated violations may result in disciplinary action, up to and including termination.

**Exceptions:**

The exception to the description above is where a staff team have an agreed 'uniform' for the role within school that they undertake e.g. PE staff. Uniforms are agreed with supervisors and designed to allow safe effective working. Where a uniform is in place it must be worn when undertaking that role and also look smart and professional.

LPI anticipates its employees to maintain a professional and well-groomed appearance when at school or participating in school-related activities, whether interacting with students, parents, colleagues or the general public.

If employees are unsure about the appropriateness of an item, they should seek guidance from their supervisor.

**SECTION: Standards of Conduct**  
**POLICY: Facilities & School Property**  
**POLICY #: 3.11**

**Facilities and School Property**

**Workplace Cleanliness and Security**

LPI employees should keep rooms and offices clean at all times. Students should be taught to keep all school areas clean. Great care must be taken in the use and handling of markers, paints, etc. Teachers are also responsible for the appearance of the area directly outside of their classroom.

Lock all doors upon leaving for the day or extended periods of time. Remove all sensitive material and personal belongings from open areas. No Lydia Patterson keys should be given to or be left in a place accessible by students at any time.

It is the responsibility of all employees to clean up after themselves in order to keep the workrooms clean at all times. All items are to be removed from refrigerators prior to leaving for the weekend. All food and containers will be thrown out at the end of the week.

**SECTION: Standards of Conduct**  
**POLICY: Parent Volunteers**  
**POLICY #: 3.12**

**Parent Volunteers**

Lydia Patterson offers parents a variety of opportunities to volunteer at the school. All parent volunteer opportunities are coordinated through the Support Services Manager and all volunteers must complete a criminal background check. This may take a minimum of 2 weeks to process. Volunteers must reapply every year.

**SECTION: Standards of Conduct**  
**POLICY: Gifts to Staff**  
**POLICY #: 3.13**

**Gifts to Staff Policy**

Students and parents often wish to express their gratitude for employees through gifts. Families are strongly encouraged to express their gratitude through the PAVEH parent group.

Occasionally for birthdays, holidays and end of the year gifts, students and parents may wish to express their gratitude. In order prevent a conflict of interest, any gift received should follow these guidelines: Faculty are prohibited from accepting monetary gifts. Individual gift cards/presents should be modest in nature (any gift value over \$50 should be reported to the Development Department and may not be allowed.)

If an employee has a question about accepting a gift or would like assistance in expressing gratitude but declining a gift from a Lydia Patterson family, the employee should contact the Director of Development.

**SECTION: Standards of Conduct**  
**POLICY: Technology**  
**POLICY #: 3.14**

**Technology**

Employee use of technology is a privilege and must be consistent with Lydia Patterson Institute's mission and values, including the Statement of Faith. Employees shall report any violation of this policy to the technology coordinator, Principal or President/Head of School. Violation of this policy may result in disciplinary action up to and including termination.

- Employees have no expectation of privacy in their use of Lydia Patterson Institute technology including but not limited to its computers, electronic devices, software, network, internet access or other systems. Lydia Patterson Institute may monitor, review, record, or log employee use of Lydia Patterson Institute technology including but not limited to personal devices connected to Lydia Patterson Institute's network or systems.
- All documents, data, files, folders, communications and other materials created using Lydia Patterson Institute technology are property of Lydia Patterson Institute. Lydia Patterson Institute does not warrant the functioning of its technology and consequently encourages employees to backup important material. Lydia Patterson Institute has the right to monitor, review, edit, remove, disclose or delete any material stored, created, received, accessed or maintained on Lydia Patterson's computers, electronic devices, network or other systems without notice to the employee. This includes but is not limited to all emails, documents, files and data.
- Employees should use their Lydia Patterson email address rather than personal email addresses to conduct school business including but not limited to communications with students and families. Employees may not use their school email address for any inappropriate, offensive or illegal activity.
- All employee communications sent to students/parents should originate through PRAXI. Emails may be made using Lydia Patterson Institute's email, cc'ing a supervisor is highly recommended.
- Internet use is generally limited to scholarly research and other educational purposes. Employees may not access or exchange unlawful or inappropriate materials including but not limited to sexually explicit material, threatening, harassing or hateful materials and games. If an inappropriate website is mistakenly or accidentally accessed, it should immediately be reported to Principal or President/Head of School.
- Lydia Patterson Institute may block certain internet content including but not limited to social media and instant messaging services. Employees shall not "friend", "follow" or have other social networking relationships with current students or alumni under age 18. Employees should not actively peruse student's social media pages or accounts unless given permission to do so by the Principals or President/Head of School. In case an employee inadvertently

becomes aware of a discipline or safety issue of a student through social media, they should contact their principal or supervisor, before responding to the student. Employees are strongly encouraged to avoid social networking relationships with parents of current students. Employees are responsible for any material posted on their social media accounts.

- School-issued computers and electronic devices are owned by Lydia Patterson Institute. Employees may only install software, applications, upgrades or games that have first been approved by the Principal or President/Head of School and are owned by Lydia Patterson Institute. Changes to operating systems must also first be approved by Principal or President/Head of School. Employees should return the computer to the Support Services Manager whenever repair, service or cleaning is needed. Employees should also ensure that all computers and electronic devices have current antivirus software, security patches, and application updates.
- Employees should safeguard Lydia Patterson Institute computers and electronic devices to prevent damage or theft. If a School owned computer or electronic device is lost or stolen, the employee must immediately report it to the manager of Technology.
- Security is the responsibility of all technology users at Lydia Patterson. Passwords must be kept confidential and not shared with others. Employees are responsible for use of their accounts, including use by other people. Employees should never allow students or others to use their accounts. Compromised passwords should be immediately changed and reported to Principal or President/Head of School. Employees must lock their screens or logout when their computers and electronic devices are not in use. Unauthorized access of any of the School's computers, electronic devices, software, network, internet access or other systems is prohibited.
- Employees may not use the School's technology for personal business ventures, mass e-mailing (SPAM), or storage of personal materials. Copyright laws must not be violated. Before using copyrighted materials, employees must receive permission for its use from the author and be sure to use proper citation.

**SECTION: Standards of Conduct**  
**POLICY: Cyber Security & Digital Devices**  
**POLICY: #: 3.15**

**Cyber Security & Digital Devices**

This section deals with all things digital at work. We want to set some guidelines for using computers, phones, our internet connection and social media to ensure security and protect our assets. This policy applies to all our employees.

**Employee Internet Usage Policy**

Our employee internet usage policy outlines our guidelines for using our company's internet connection, network and equipment. We want to avoid inappropriate or illegal internet use that creates risks for our company's legality and reputation.

This employee internet usage policy applies to all our employees, contractors, volunteers and partners who access our network and computers.

Employee internet usage policy elements

Our employees are advised to use our school's internet connection for the following reasons:

- To complete their job duties.
- To seek out information that they can use to improve their work.

We don't want to restrict our employees' access to websites of their choice, but we expect our employees to exercise good judgement and remain productive at work while using the internet.

Any use of our network and connection must follow our confidentiality and data protection policy.

Employees should:

- Keep their passwords secret at all times.
- Log into their corporate accounts only from safe devices.
- Use strong passwords to log into work-related websites and services.

Our employees must not use our network to:

- Download or upload obscene, offensive or illegal material.
- Send confidential information to unauthorized recipients.
- Invade another person's privacy and sensitive information.
- Download or upload movies, music and other copyrighted material and software.

- Visit potentially dangerous websites that can compromise the safety of our network and computers.
- Perform unauthorized or illegal actions, like hacking, fraud, buying/selling illegal goods and more.
- We also advise our employees to be careful when downloading and opening/executing files and software. If they're unsure if a file is safe, they should ask our Technology contractor.

Our school may install anti-virus and disk encryption software on our school computers. Employees may not deactivate or configure settings and firewalls without managerial approval.

We won't assume any responsibility if employee devices are infected by malicious software, or if their personal data are compromised as a result of inappropriate employee use.

We expect our employees to respect and protect our school's equipment. "School equipment" in this computer usage policy for employees includes company-issued laptops, tablets and any other electronic equipment, and belongs to our school.

We advise our employees to lock their devices in their desks when they're not using them. Our employees are responsible for their equipment whenever they take it out of their offices.

Employees who don't conform to this employee internet usage policy will face disciplinary action. Serious violations will be cause for termination of employment, or legal action when appropriate. Examples of serious violations are:

- Using our internet connection to steal or engage in other illegal activities.
- Causing our computers to be infected by viruses, worms or other malicious software.
- Sending offensive or inappropriate emails to our customers, colleagues or partners.

This section deals with all things digital at work. We want to set some guidelines for using computers, phones, our internet connection and social media to ensure security and protect our assets.

**SECTION: Standards of Conduct**  
**POLICY: Cell Phone Use**  
**POLICY: #: 3.16**

**Cell Phone Use**

We recognize that cell phones have become an integral part of everyday life. They may be a great asset if used correctly (for productivity apps, calendars, etc.). But, cell phones may also cause problems when used imprudently or excessively. Faculty may not use cell phones in the classroom during class time.

Despite their benefits, personal cell phones may cause problems in the workplace. Employees who use their cell phones excessively may:

- Get distracted from their work.
- Disturb colleagues by speaking on their phones.
- Cause security issues from inappropriate use of school-issued equipment or misuse of our school's internet connection.

Our school expects employees to use their cellphones prudently during working hours.

We advise our employees to:

- Surf the internet, text and talk on the phone only during break times.
- Turn off or silence their phones during work hours and when asked to.

We won't allow employees to:

- Play games on the cell phone during working hours.
- Use their phones for any reason while working.
- Use their cell phone's camera or microphone to record confidential information.
- Use their phones in areas where cell use is explicitly prohibited (e.g. classroom during class time.)
- Speak on their phones within earshot of colleagues' working space during working hours.
- Download or upload inappropriate, illegal or obscene material on a cell phone using a corporate internet connection.

LPI retains the right to monitor employees for excessive or inappropriate use of their cell phones. If an employee's phone usage causes a decline in productivity or interferes with our operations, we'll ban that employee from using their cell phones.

Employees may face severe disciplinary action up to and including termination, in cases when they:

- Cause a security breach.
- Violate this policy.
- Violate our confidentiality policy.

**SECTION: Standards of Conduct**  
**POLICY: Email**  
**POLICY: #: 3.17**

**Email**

Email is essential to our work. You should use your school email primarily for work, but we allow some uses of your school email for personal reasons. Employees shouldn't use their school email to:

- Register to illegal, unsafe, disreputable or suspect websites and services.
- Send obscene, offensive or discriminatory messages and content.
- Send unauthorized advertisements or solicitation emails.
- Sign up for a competitor's services unless authorized.

Our school has the right to monitor work emails. We also have the right to monitor websites employees visit on our computers.

You can use your school email for work-related purposes without limitations. For example, you can sign up for newsletters and online services that will help you in your job or professional growth.

You can use your email for personal reasons as long as you keep it safe, and avoid spamming and disclosing confidential information.

No matter how you use your school email, we expect you to avoid:

- Signing up for illegal, unreliable, disreputable or suspect websites and services.
- Sending unauthorized marketing content or emails.
- Registering for a competitor's services, unless authorized.
- Sending insulting or discriminatory messages and content.
- Spamming other people's emails, including your coworkers.

In general, use strong passwords and be vigilant in catching emails that carry malware or phishing attempts. If you are not sure that an email you received is safe, ask our Technology contract

**SECTION: Standards of Conduct**  
**POLICY: Acceptable Use of Social Media**  
**POLICY #: 3.18**

**Acceptable Use of Social Media**

Lydia Patterson Institute (LPI) recognizes that employees participate in social media activities both during and outside of working hours. While we support the personal use of social media and acknowledge its value in communication, community-building, and professional growth, all employees are expected to engage in responsible behavior consistent with LPI's mission, values, and policies.

This policy applies to all staff and covers both personal and professional use of social media platforms, including but not limited to: Facebook, X (formerly Twitter), Instagram, TikTok, LinkedIn, YouTube, WhatsApp, blogs, forums, and other digital platforms.

**I. Purpose and Scope**

This policy provides a framework to guide staff in the appropriate use of social media. Social media is a space where people exchange information, opinions, and experiences. Whether handling an official school account or using a personal profile, staff are expected to:

- Be professional
- Maintain confidentiality
- Protect LPI's reputation and students
- Comply with all institutional, legal, and ethical standards

"Social media" in this policy refers to all digital communications, including blogs, social networks, messaging apps, chat rooms, and forums.

**II. General Expectations for All Employees**

LPI expects all employees to:

- Uphold our Christian values and professional standards in all online interactions.
- Protect confidentiality: Never post or share confidential information about students, families, staff, or school matters. This includes photos, names, academic data, or identifying details.
- Avoid defamatory, offensive, or derogatory content: This includes hate speech, harassment, threats, or any language that violates our Anti-Harassment or Equal Opportunity policies.
- Avoid sharing school intellectual property (curriculum, internal documents, logos, images, etc.) without explicit written permission.
- Respect boundaries: Staff should never engage in personal social media interactions with current students or minors under any circumstance.

Even off-duty, employees are considered ambassadors of LPI and must conduct themselves accordingly.

### **III. Personal Social Media Use**

Employees may not use their personal accounts to represent the school or imply endorsement without prior authorization. When posting personal opinions, it is strongly recommended that employees include a disclaimer such as:

*“Opinions are my own and do not reflect those of my employer.”*

Employees should:

- Avoid posting any school-related images, student photos, or event recordings on personal accounts without prior written approval and proper release forms.
- Refrain from engaging in online disputes, gossip, or criticisms involving colleagues, students, or school leadership.
- Never use personal platforms to undermine institutional policies or incite division.

### **IV. Professional or School-Affiliated Accounts**

Only employees authorized by the President or Development & Communications Director may manage official school-affiliated social media accounts. These individuals must:

- Be respectful, professional, and aligned with LPI’s mission and tone.
- Obtain approval for public-facing content before posting.
- Use school-owned email addresses and credentials (not personal ones) to create and manage accounts.
- Promptly remove or correct inaccurate, outdated, or misleading information.
- Not delete comments or block users without clear cause and documentation.
- Follow LPI’s confidentiality, branding, copyright, and privacy policies at all times.

Passwords and content for all school-affiliated accounts remain the property of LPI and must be returned or transferred upon role change or separation from employment.

### **V. Use During Work Hours and with School Resources**

- Personal use of social media during work hours is not permitted.
- School internet, devices, and other resources should not be used for personal social media browsing.

### **VI. Post-Employment and Confidentiality**

This policy remains binding after separation from employment. Former employees may not:

- Present themselves as current LPI employees
- Use LPI logos or materials
- Disclose confidential or proprietary information
- Speak on behalf of LPI in any public forum or platform

### **VII. Reporting Violations**

Employees who witness inappropriate use of social media that may harm the school, violate confidentiality, or constitute harassment should report the incident to the President/Human Resources.

### **VIII. Disciplinary Consequences**

Violations of this policy may result in disciplinary action, including but not limited to:

- Verbal or written warnings
- Suspension of social media privileges
- Termination of employment
- Legal action, depending on the severity of the violation

#### **Examples of non-compliance include:**

- Using social media during work hours in a way that affects job performance
- Disclosing confidential information through any account
- Posting hate speech, bullying, or harassment
- Representing the school without approval
- Sharing student information or imagery without authorization

#### **Confidentiality Guidelines**

- Do not publish, post, or release information that is considered confidential or private. Online conversations are never private.
- Never share or transmit personal information of students, parents, LPI employee, or colleagues online.
- School employees should not identify students or their families in social media posting unless doing so with permission of the School.
- Do not caption or tag photos of the students.
- Do not post photos of students unless doing so with permission of the School.
- Do not post details (exact time and exact locations) of travel itineraries, including field trips.

LPI reserves the right to monitor school-affiliated social media use and to take appropriate action when necessary. Every employee is expected to exercise integrity, caution, and care when posting or interacting online, whether in a personal or professional capacity.

**SECTION: Standards of Conduct**  
**POLICY: Time Reporting**  
**POLICY #: 3.19**

**Time Reporting**

Lydia Patterson Institute is committed to adhering to all relevant wage and hour laws, including the Fair Labor Standards Act. Employees classified as non-exempt are required to maintain accurate daily records of their working hours. Any falsification or unauthorized alteration of an employee's time record is considered a violation of Lydia Patterson Institute policy and may result in termination.

**SECTION: Standards of Conduct**  
**POLICY: Employee Arrests &**  
**Convictions**  
**POLICY #: 3.20**

**Employee Arrests and Convictions**

Employees must notify their immediate supervisor within 24 hours of any arrest, indictment, conviction, no-contest or guilty plea, or other adjudication of any felony convictions. If an educator is arrested or faces criminal charges, the president must report the educator's criminal history to the Division of Investigations at TEA.

# **SECTION 4: EMPLOYMENT**

**SECTION: Employment**  
**POLICY: Recruitment and Selection**  
**POLICY #: 4.01**

**Recruitment and Selection**

Lydia Patterson Institute is deeply committed to selecting the most competent candidates for approved positions while adhering to all relevant employment laws. In order to achieve this, we follow a rigorous recruitment and selection process.

Our recruitment process is designed to attract a diverse pool of qualified candidates from various sources. Our selection process involves careful evaluation of each candidate's qualifications, experience, and potential fit with the organization.

We conduct thorough interviews, reference checks, and assessments to ensure that the candidate's skills and experience align with the job requirements. All recruitment and selection decisions are made without regard to race, color, national origin, sex, age, disability, or any other legally protected status.

We take pride in our commitment to hiring the best and brightest talent and ensuring that our recruitment and selection practices are fair, transparent, and in compliance with all applicable employment laws.

## **Job Descriptions**

A job description is an official document outlining the nature, scope, physical demands, and duties of a specific role within Lydia Patterson Institute. These descriptions are utilized for training, performance evaluations, promotions, recruitment, and hiring. They are crafted by the Business Manager in collaboration with the incumbent employee and the supervisor. While they provide a general overview of the role's nature, scope, physical demands, and responsibilities, they are not exhaustive, and employees may have duties and requirements not explicitly outlined in their job description.

**SECTION: Employment**  
**POLICY: Employee Categories**  
**POLICY #: 4.03**

**Employee Categories**

The Fair Labor Standards Act (FLSA) outlines the minimum standards for employee wages, overtime pay, record keeping, and child labor. According to the FLSA, there are two types of employees: exempt and non-exempt. Exempt employees are not eligible for overtime pay and are usually salaried workers whose primary job duties meet the applicable definition under the FLSA.

At Lydia Patterson Institute, all faculty members, staff, administration, and employees are classified as either full-time, part-time, or temporary, as well as non-exempt or exempt. During the hiring process, employees are assigned to their respective job classifications. If employees are unsure which category their position falls under, they may inquire with the school administration or the President.

Due to the nature of work at Lydia Patterson Institute, it is understood that employees of Lydia Patterson Institute will work a variety of schedules to accomplish the task for which they were hired. LPI maintains standard definitions of employment and classifications according to the following definitions:

- **Exempt** – positions that meet specific requirements established by the Fair Labor Standards Act (FLSA). Exempt positions are not eligible for overtime pay. Faculty and other employees exempt from the overtime requirements of federal law are not paid for overtime work and are not required to keep track of time worked. The salary paid to an exempt employee is a predetermined amount that is not subject to deductions for variations in the quantity or quality of the work performed and is compensation for all hours worked.
- **Non-exempt / Hourly** – positions that do not meet FLSA exemption requirements. Nonexempt positions are eligible for overtime pay as required by applicable federal and state law. All non-exempt employees must keep accurate records of all time worked. Nonexempt employees are required to report all hours worked and are paid for every hour worked. No off-the-clock work is permitted, whether voluntarily or involuntarily.
- **Full-Time** – Employees and administrators scheduled to work at least 40 hours per week are classified as full-time employees as long as they maintain continuous employment with Lydia Patterson Institute.
- **Part-Time** – Employees hired to perform regular and continuing work on a consistent work schedule that would generally require less than 35 hours per week are classified as parttime employees.

- **Auxiliary Personnel** – Individuals employed or retained on a temporary or supplementary basis, stipend-only basis, or as an independent contractor are considered auxiliary personnel. These positions include but are not limited to substitute teachers, teacher's aides, interns, coaches, security officers, and contracted personnel. Not all auxiliary personnel are employees of Lydia Patterson Institute (e.g., independent contractors are not employees). Auxiliary personnel who are not employees of Lydia Patterson Institute are not eligible for any employee benefits provided by Lydia Patterson Institute. However, all auxiliary personnel are expected to follow the same policies, procedures, and standards of conduct as employees of Lydia Patterson Institute while performing their duties, including compliance with safety, confidentiality, and professional behavior expectations. Failure to adhere to these policies may result in immediate termination of services, dismissal from duties, or non-renewal of the contract or stipend.

All auxiliary personnel are required to review and sign the Auxiliary Personnel Acknowledgment Form prior to beginning their duties. This signed form will be kept on file by the Business Office or Human Resources as documentation of their agreement to comply with School policies.

It is Lydia Patterson Institute's policy to compensate employees for all time worked in compliance with the FLSA and all other applicable laws. To ensure that employees are properly paid for all hours worked, and that no improper deductions are made, employees must review their paychecks promptly and report any errors to Human Resources. All errors will be promptly corrected.

All new employees will receive a ninety (90) days probationary time period/contract during their first year. Upon completion of the probationary period the employee will be evaluated by supervisor and permanent employment will be decided.

Faculty are required to possess a minimum of a bachelor's degree from an accredited college or university and 12 hours in professional education or present a plan for acquiring these hours. This will be considered for salary purposes.

Faculty and staff employment or reemployment is subject to annual recommendation by their supervisor and written approval by the President.

Returning faculty members will receive a letter of intent during the spring semester and will have one week to accept or decline the invitation of reemployment.

Contracts will be offered to faculty employees by May 15, annually unless a recommendation for non-renewal of contract is given.

Hiring, dismissal, and renewal of contracts of all employees are the responsibility of the President who will receive recommendations from the immediate supervisor.

Faculty with no certification upon hiring will be required to attend at least two designated professional development or teaching training programs assigned by Lydia Patterson Institute as a condition for continued employment.

Step Increases:

- Certification is required in order to qualify for step increases.
- Faculty who are not certified may still be eligible for annual increases at the discretion of the administration, but will not advance on the step scale until certification is achieved.

Employees in professional and administrative positions that do not require certification, such as non-instructional administrators, are not under contract. Their employment is not for any specified term and may be terminated by the President.

**SECTION: Employment**  
**POLICY: Mandatory Training**  
**POLICY #: 4.04**

**Mandatory Training**

All employees, overnight trip chaperones, and substitute teachers are required to complete online mandatory training through Vector Training. Required courses are determined annually by administrators and tracked for completion. Assigned LPI employees are also assigned to complete CPR/AED training.

Teachers new to Lydia Patterson are required to fulfill all training requirement by the conclusion of their probation period.

Additional training requirements apply to coaching employees as outlined in the Coaches Athletic Handbook.

**SECTION: Employment**  
**POLICY: References**  
**POLICY #: 4.05**

**References**

Any request for references (verbal or written), such as a reference letter for current or past employees, must be directed in writing to Human Resources/President.

Employment reference requests from outside companies will be addressed by Human Resources/President. The information provided will be name, position, and dates of employment.

Employees are not permitted to give any type of reference with respect to any current or former employee. Please be aware that violation of this policy may subject an employee to disciplinary action including immediate termination.

**SECTION: Employment**  
**POLICY: Probationary Period**  
**POLICY #: 4.06**

**Probationary Period**

During the initial ninety (90) days of employment at LPI, each new employee will undergo an onboarding and orientation period, during which they will receive guidance on their performance from their supervisor. If the employee's work is unsatisfactory, they will be informed of the specific areas needing improvement. Failure to demonstrate satisfactory progress may result in termination of employment.

It is important to note that during this period, employees are not eligible to take any accrued time off leave.

### **Promotion**

Lydia Patterson Institute is dedicated to fostering the growth and advancement of its staff members and is committed to internal promotion opportunities. To ensure the retention of our skilled workforce, we actively encourage promotions within the organization. For an existing employee to be considered for a promotion, a suitable position must be available within the organization. Additionally, employees will only qualify for promotion after having served in their current role for at least nine (9) months, maintaining a satisfactory performance record, and not receiving any corrective action within the preceding nine-month period.

### **Reassignment**

The President may reassign all staff members if it is determined to be in the best interest of the school. Reassignment refers to being transferred to another position, and any changes in employee responsibilities will be documented. Extracurricular or supplemental duty assignments can be reassigned at any time.

**SECTION: Employment**  
**POLICY: Chapel Attendance**  
**POLICY #: 4.09**

**Chapel Attendance**

Attendance at scheduled chapel services is mandatory for all faculty and staff of Lydia Patterson Institute (LPI), as these gatherings are central to our faith-based mission and school culture.

The only exception to this requirement applies to staff members who are specifically assigned to remain at the front desk or designated security post to ensure campus safety and accessibility during chapel hours. These assignments must be pre-approved by administration.

Any questions or requests for clarification regarding this policy should be directed to the Office of the President.

**SECTION: Employment**  
**POLICY: Employee Attendance**  
**and Punctuality**  
**POLICY #: 4.10**

**Employee Attendance and Punctuality**

Regular and punctual attendance at Lydia Patterson Institute (LPI) is a fundamental requirement of every role. All employees are expected to arrive at work as scheduled, on time, and ready to commence duties. Additionally, employees are expected to remain at their designated work site for the entirety of their scheduled work hours unless otherwise authorized. Any deviations from the standard work schedule—including changes in location—require prior written approval from a supervisor.

This policy applies to all employees regardless of position or employment type. Punctuality and consistent attendance support the efficiency, collaboration, and smooth functioning of our school environment. Most employees work closely with colleagues, and frequent or unexcused absences and tardiness can disrupt operations and place an unfair burden on others.

We recognize that occasional delays—such as a flat tire, unexpected traffic, or other minor inconveniences—may occur. While these may cause you to arrive late, they generally do not justify being absent for the entire workday. In such situations, you are still expected to report to work as soon as possible and to communicate promptly with your supervisor.

**Absenteeism** is defined as frequent or excessive absence from job responsibilities, including repeated use of sick leave without valid documentation.

**Tardiness** includes arriving late, taking extended breaks, or leaving early without supervisor approval. Employees are required to monitor and accurately record their working hours in the Praxi system to ensure proper compensation.

**Reporting Absences or Tardiness**

If you are unable to report to work or will be late, notify your supervisor as soon as possible. Upon return, you must complete a Leave Form. Unreported or unexcused absences exceeding three consecutive workdays will be considered job abandonment.

We understand that emergencies such as serious accidents, acute illness, or family crises can arise. In such cases, your absence may be marked as “excused” upon appropriate verification (e.g., doctor’s note or relevant documentation). However,

habitual tardiness or absence—even with explanation—may still result in corrective action.

### **Examples of Unexcused Absences or Tardiness**

The following are examples of unexcused and unacceptable reasons for absence or tardiness (this list is not exhaustive):

- Oversleeping or failure to set an alarm
- Minor vehicle issues (e.g., flat tire, dead battery) that could have been resolved in time to report later in the day
- Stopping for coffee, breakfast, or personal errands on the way to work
- Routine or expected traffic delays
- Public transportation delays without proper contingency
- Poor time management or failure to plan ahead
- Bad weather (e.g., rain, wind, or cold), excluding extreme or hazardous conditions (e.g., flooding, severe storms)
- Childcare issues due to lack of planning or non-emergency situations
- Non-approved vacation or personal travel
- Not feeling like coming in/wanting a “mental health day” without proper documentation or pre-approval
- Attending personal appointments (e.g., hair, nails, car repair) scheduled during work hours without supervisor approval
- Staying home for non-urgent home repairs or deliveries (e.g., waiting for a plumber, cable technician, or furniture delivery)
- Taking the full day off after a minor delay (e.g., car trouble in the morning) instead of reporting late
- Failing to return after lunch without reason or permission
- Assuming absence or tardiness is excused without notifying your supervisor
- Forgetting scheduled work hours
- Calling in sick frequently without documentation
- Taking excessive breaks or extended lunches without approval

### **Incentive for Excellent Attendance**

Employees with fewer than three incidents of tardiness or absenteeism in a full calendar year will receive **one additional paid day off** the following year.

A good attendance record includes:

- Reporting to work consistently
- Arriving on time for scheduled shifts
- Leaving only at the scheduled end time (unless overtime is authorized)
- Remaining on-site during work hours (except for breaks)
- Taking breaks within the allotted timeframe
- Timely and appropriate communication with supervisors regarding absences or lateness
- Having valid reasons for any absence or tardiness

## **Supervisor Responsibilities and Disciplinary Action**

Supervisors are responsible for monitoring employee attendance and addressing issues early. If a pattern of tardiness or absenteeism emerges, the supervisor should schedule a private conversation with the employee to understand the circumstances and provide guidance.

If a supervisor suspects abuse of sick leave or intentional tardiness, the matter must be reported to the President for review. The employee may be required to submit a doctor's note or other verification.

**Progressive disciplinary action** may include:

- Verbal or written warnings
- Corrective counseling
- Suspension
- Termination of employment (in severe or unresolved cases)

Disciplinary action may be taken if:

- The employee shows no improvement following counseling
- Tardiness or absenteeism is determined to be willful
- Absences negatively affect work performance
- Unexcused/unreported absences occur (these will not be compensated)

**SECTION: Employment**  
**POLICY: Scheduled Absences**  
**POLICY #: 4.11**

**Scheduled Absences**

Scheduled absences, which include pre-approved sick leave (medical appointments, etc.) and time-off/vacation leave must be requested and approved seven (7) working days before the planned leave. Employees must submit a Leave Request Form to supervisor for approval.

All time off requests are subject to supervisor's approval and President's approval for exceptions. The supervisor may refuse to grant the request if doing so would unduly hamper the school's efficiency during peak workdays. Additionally, time off cannot be taken before or after a school holiday. Employees will not be paid for a Holiday if time off taken before or after a holiday. Unless the employee provides a doctor's note.

Time off:

- Should NOT be taken during the first two weeks of the school year and the last two weeks before the end of the school year
- Should NOT be taken during nine-weeks testing
- Should NOT be taken during parent-teacher conferences
- Should NOT be taken during open house or special events
- Should NOT be taken during professional development

If the employee is off before and/or after a paid holiday they must provide a doctor's note in order to be paid for the holiday. Unless the President approves through an exception.

**SECTION: Employment**  
**POLICY: Medical Certification**  
**POLICY #: 4.12**

**Medical Certification**

A doctor's note may be required for absences that exceed two days, or if there's a pattern of frequent absences.

If an employee is not able to call-in due to illness, a family member should call the employees supervisor. Employees should also consider whether they should call in sick based on their ability to perform their job. Even if they're not contagious, feeling ill can affect their performance, and it may be best to focus on recovering.

**SECTION: Employment**  
**POLICY: Performance Evaluation**  
**POLICY #: 4.13**

**Performance Evaluation**

Evaluation of an employee's job performance is an ongoing process that aims to facilitate improvement. Performance evaluation is based on an employee's assigned job responsibilities and other job-related criteria. All employees will participate in the evaluation process with their assigned supervisor at least once a year. Written evaluations will be completed on forms approved by the school. Reports, correspondence, and memoranda can also document performance information. All employees will receive a copy of their written evaluation, participate in a performance conference with their supervisor, and be able to respond to the evaluation.

**SECTION: Employment**  
**POLICY: Professional Development**  
**POLICY #: 4.14**

**Professional Development**

The school organizes staff development activities to meet the needs of its employees. Instructional staff primarily receive school-based training aimed at achieving school performance objectives outlined in the campus improvement plan approved by the principal and President. Non-instructional staff participate in training designed to meet specific licensing requirements and develop their skills. Employees with renewable certificates are accountable for obtaining the necessary training hours and maintaining proper documentation.

**SECTION: Employment**  
**POLICY: School Year Calendar**  
**POLICY #: 4.15**

**School Year Calendar**

The administration retains the authority to make operational decisions related to the implementation of the calendar, as outlined below:

**1. Supplemental Calendars**

- The administration may construct calendars for extracurricular activities, athletic schedules, and school programs, provided they align with and do not interfere with the basic instructional calendar.

**2. Professional Development Days**

- The administration may schedule teacher training or workdays (without student attendance), not to exceed five (5) half-days per academic year.

**3. Emergency Closures**

- The President, in consultation with appropriate advisors, has the authority to close Lydia Patterson Institute in the event of emergencies or unforeseen circumstances (e.g., severe weather, natural disasters, national or community crises).
- Every effort will be made to communicate closures as early as possible in the day.

**4. Make-Up Days**

- If emergency conditions require more than two (2) unplanned closure days, the President will determine the most appropriate plan to recover lost instructional time.
- Should the recommendation involve extending the school year into the summer months, written approval from the Board of Trustees is required prior to implementation.

**5. Other Calendar-Related Decisions**

- The administration may make additional calendar-related decisions as needed, provided such decisions align with the mission, goals, and operational needs of LPI.

# **SECTION 5: EMPLOYEE BENEFITS**

**SECTION: Employee Benefits**  
**POLICY: Holidays**  
**POLICY #: 5.01**

**Holidays**

All full-time employees are eligible for paid holidays from their first day of employment. There are twelve paid holidays, and holidays that fall during an employee's scheduled vacation are not counted as vacation days. If a holiday falls on a day a part-time employee is not scheduled to work, the employee will not receive holiday pay. If a holiday falls on a Saturday, the preceding Friday will be considered a holiday, and if it falls on a Sunday, the following Monday will be considered a holiday.

- New Year's Day
- Martin Luther King Jr.'s Birthday
- President's Day
- Cesar Chavez Day
- Holy Week
- Memorial Day
- Fourth of July
- Labor Day
- Thanksgiving Day
- Christmas Day

**SECTION: Employment Benefits**  
**POLICY: Sick/Personal Leaves**  
**POLICY #: 5.02**

**Sick/Personal Leaves**

Sick/personal leave is provided to prevent loss of income during periods of absence from work caused by illness or injury. Employees start accruing paid sick/personal leave from the time of employment, but time off is available after the employee's probationary period (90 days). If sick days must be taken before the probationary period is over, employees may be approved to take leave without pay. Employees will be allocated sick/personal days as follows:

- Faculty: 10 days of sick/personal leave at the beginning of the school year through the end of the school year.
- Exempt Employees: 12 days of sick/personal leave.
- Non-exempt Employees: 8 days of sick/personal leave.

\* For the purpose of this policy, the year will run from September 1 to August 31. New employees will be allocated the number of days based on their start date.

Faculty members missing time due to leave are required to leave detailed lesson plans for a substitute teacher. Missed time in the classroom should not be taken lightly, and every effort must be taken to provide plans and materials to further the academic goals and objectives of the class.

**SECTION: Employee Benefits**  
**POLICY: Sick Leave Pool**  
**POLICY #: 5.03**

**Sick Leave Pool**

Lydia Patterson Institute has implemented a voluntary Sick Leave Pool for staff employees. Employees can contribute a maximum of three days per fiscal year to the pool, with all contributions of leave required to be in writing. Only full-time, benefits- eligible employees who contribute to the sick pool are eligible to request leave from the pool. Employees applying for leave from the pool must have utilized all their leave entitlement (sick/personal and vacation) before applying for leave from the pool. They must also be participating in the pooling program.

Pooled leave is accessible to employees who have experienced a catastrophic illness or injury, defined as a severe condition or combination of conditions affecting the mental or physical health of the employee or the employee's immediate family. This condition necessitates the services of a licensed practitioner for a prolonged period, leading the employee to exhaust all earned leave time and lose compensation from the school. The amount of pool time received from the pool may not exceed the employee's earned time.

**SECTION: Employee Benefits**  
**POLICY: Parental Leave**  
**POLICY #: 5.04**

**Parental Leave**

Parental leave is available to all employees of Lydia Patterson Institute for the birth of a child, adoption, or placement for foster care. To be eligible for parental leave, employees must have completed at least 12 months or 52 weeks of service immediately before the leave and are entitled to up to 8 weeks of parental leave. Paid parental leave of up to 8 weeks is provided, with paid time charged against accumulated sick/personal leave and vacation first. Requests for parental leave should be directed to the supervisor as early as possible, but not less than 30 days before the expected start of the leave. Recommendations from the immediate supervisor will be considered by HR/President.

**SECTION: Employee Benefits**  
**POLICY: Health Benefits – Cafeteria Plan**  
**POLICY #: 5.05**

**Health Benefits – Cafeteria Plan**

Lydia Patterson Institute offers eligible employees the opportunity to participate in a Cafeteria Plan in accordance with IRS Section 125 regulations. This plan allows employees to pay for certain qualified insurance premiums using pre-tax dollars, providing a cost-saving benefit through payroll deductions.

Eligible pre-tax premiums may include:

- Disability Insurance
- Accidental Death and Dismemberment (AD&D)
- Cancer and Dread Disease Coverage
- Dental Insurance

Participation in the Cafeteria Plan is voluntary, but employees must make an active election to either accept or decline the benefit. Failure to submit an election will result in automatic non-enrollment for that plan year.

Key Guidelines:

- New employees must elect to accept or decline Cafeteria Plan participation within the first 30 days of employment.
- All employees must make an annual election during the designated open enrollment period.
- All elections are binding for the plan year unless a qualifying life event occurs (e.g., marriage, birth, loss of coverage).
- Claims for eligible benefits are processed through a third-party plan administrator, not directly by LPI.

Employees are encouraged to review plan details carefully and contact the Business Office or third-party administrator with any questions prior to enrollment.

**SECTION: Employee Benefits**  
**POLICY: Disaster Leave**  
**POLICY #: 5.06**

**Disaster Leave**

The policy outlines a "disaster" as an abrupt and exceptional event that significantly harms an employee's residence, such as floods and fires. Employees impacted by a disaster are entitled to receive up to five days of leave with regular pay, to be taken within the initial thirty days following the disaster. Accrued personal or vacation days may be utilized if the employee's absence extends beyond five days. In the event of employee injury due to the disaster, sick time should be utilized initially, with the option to use Disaster Leave following recovery, combined with personal and/or vacation days if necessary.

**SECTION: Employee Benefits**  
**POLICY: Vacation Leave**  
**POLICY #: 5.07**

**Vacation Leave**

All full-time employees, except for faculty, are entitled to paid vacation. The amount of vacation pay will be determined based on the standard work week of forty hours and can only be taken once accrued. Vacation time is available after the six (6) month of employment. Vacation time accrual follows the schedule outlined below:

For Secretarial/Clerical and Service/Maintenance Personnel:

| <b>Years of Service</b> | <b>Time Off</b> |
|-------------------------|-----------------|
| 6 months to 3 years     | 5 days          |
| 4 to 10 years           | 10 days         |
| 10 and up years         | 15 days         |

For Executive/Administrative and Professional Personnel:

| <b>Years of Service</b> | <b>Time Off</b> |
|-------------------------|-----------------|
| 6 months to 3 years     | 10 days         |
| 4 to 7 years            | 15 days         |
| 7 and up years          | 20 days         |

All vacation requests are subject to the president's approval, based on the recommendation of the employee's immediate supervisor. Employees may not request time off before and/or after a paid holiday. Exceptions can be made on this by the President, the request must be presented by the supervisor. The President may refuse to grant vacation requests if doing so would unduly hamper the school's efficiency during peak workdays.

School holidays occurring during approved vacation time will not be charged against employees' vacation time.

Vacation or time off:

- Should be taken during September 15 through July 15
- Should NOT be taken during the first two weeks of the school year and the last two weeks before the end of the school year
- Should NOT be taken during nine-weeks testing
- Should NOT be taken during parent-teacher conferences
- Should NOT be taken during open houses and special events
- Should NOT be taken during professional development
- Should be taken one (1) week at a time unless approved by supervisor and ratified by President.

Employees are encouraged to take their vacations during September 1 to July 15.

Unused vacation days cannot be carried over to the following year. However, with the President's approval, an employee may be allowed to cash out a maximum of 5 unused vacation days at the end of the fiscal year. For professional and executive staff with more than 7 years of service they can cash out a maximum of 10 days with the approval of the President.

**SECTION: Employee Benefits**  
**POLICY: Jury Duty and Court Leave**  
**POLICY #: 5.08**

**Jury Duty and Court Leave**

Employees will receive payment for the days they are required to attend court. Employees are required to immediately notify supervisors if called for jury duty. In the event an employee is subpoenaed as a witness for a matter unrelated to Lydia Patterson Institute, they will be excused from work but will not receive payment for the time off. In such circumstances, the employee may use accrued vacation or personal days, if available.

Any summons must be promptly presented to the supervisor on the first day after receipt. If an employee is not required to serve on a day, they are normally scheduled to work, or if they are excused before serving three hours of jury duty, they are expected to report back to work. Proof of jury service and attendance will be required. The time spent on jury duty will not be counted as time worked for purposes of computing overtime pay or any other pay that counts toward time worked, except for purposes of computing vacation or sick pay earned credits.

Furthermore, employees will not be obligated to reimburse Lydia Patterson Institute for any compensation or expense allowance received for jury duty. Conversely, suppose an employee is required to appear in court for a matter pertaining to Lydia Patterson Institute. In that case, they will be compensated at their standard base pay rate for such time and reimbursed for any out-of-pocket expenses incurred.

**SECTION: Employee Benefits**  
**POLICY: Military Leave**  
**POLICY #: 5.09**

**Military Leave**

Lydia Patterson Institute is committed to supporting military employees, including the National Guard and Reserve. Our policy ensures that these employees have job protection as mandated by the Uniformed Services Employment and Reemployment Act and relevant state laws.

**Active Duty:** The policy states that any employee leaving Lydia Patterson Institute for full-time, active duty in the armed forces for up to four years (with a possible one-year extension) will be considered on "active, full-time military duty." They are entitled to the difference between their military pay and their wages from the institute for up to twenty working days if their military pay is less than their regular salary. Upon their return, they are entitled to reinstatement to their former position or a similar one, provided they meet certain conditions, including making an application for reemployment within 90 days of release from active duty.

**Reserve/National Guard:** Employees who become members of the military Reserve or National Guard will be considered to be on military leave of absence during their initial period of active-duty training, which typically lasts 3-6 months. Employees who meet the requirements will be reinstated to their former position or a similar one after completing their training. Additionally, Reservists and National Guard members are allowed unpaid military leave of absence to perform short-term training, such as weekly drills or summer encampments.

**SECTION: Employee Benefits**  
**POLICY: Bereavement Leave**  
**POLICY #: 5.10**

**Bereavement Leave**

Lydia Patterson Institute provides limited paid leave for full-time and part-time employees when an immediate family member passes away. Part-time employees receive bereavement hours based on their normal work schedule. The time off is deducted from sick/personal leave, and all bereavement leave requests must be approved by supervisors. Employees are also required to inform their supervisors about their bereavement leave requests.

The policy allows up to three working days of sick/personal leave for immediate family members, including spouse, child, sibling, parent, grandchild, grandparent, father-in-law/mother-in-law, and foster child. Employees required to travel out of state may be granted two additional days. Leave time will not count in any overtime computation. Part-time employees can request time off using vacation or as unpaid leave with approval from their supervisor or President. Verification of the need for leave may be required by Lydia Patterson Institute.

**SECTION: Employee Benefits**  
**POLICY: Health Insurance**  
**POLICY #: 5.11**

**Health Insurance Policy**

Lydia Patterson Institute (LPI) provides health, accident, and life insurance benefits to support the well-being of its employees. The following guidelines apply:

**1. Eligibility**

- All regular full-time employees are eligible for hospitalization and medical insurance coverage.
- Coverage becomes effective on the first day of the month following 30 days of continuous full-time employment, unless otherwise specified by the insurance carrier.
- Part-time, temporary, substitute, and seasonal employees are not eligible for health and accident insurance benefits.

**2. Premium Contributions**

- LPI contributes 75% of the total premium cost for eligible employees.
- Employees are responsible for the remaining 25% of the premium, which is payroll-deducted each pay period.
- Employees may elect to add dependent coverage (spouse, children) at their own expense.

**3. Life Insurance**

- LPI provides a basic life insurance policy for all full-time employees, paid entirely by the institution.

**4. Additional Voluntary Insurance**

- Employees may elect to purchase additional insurance coverage (e.g., dental, vision, supplemental life, disability) at their own expense.
- Information on optional insurance programs is available from the Business Office or HR.

**5. Leave of Absence and Continuation of Coverage**

- Employees on an approved leave of absence may continue health insurance coverage, but are responsible for paying 100% of the premium directly to Lydia Patterson Institute by the due date provided.
- Employees who separate from employment may be eligible for continuation of coverage under federal COBRA regulations, and will receive notice of eligibility and instructions.

**6. Enrollment and Changes**

- Employees must enroll within 30 days of hire or during the annual open enrollment period.
- Qualifying life events (marriage, divorce, birth, adoption, loss of other coverage, etc.) allow changes in coverage within 30 days of the event. Documentation may be required.

**SECTION: Employment Benefits**  
**POLICY: Unpaid Personal Leave &**  
**Long-Term**  
**POLICY #: 5.12**

**Unpaid Personal Leave and Long-Term Leave**

All employees at LPI are granted a form of Paid Time Off (PTO) each year, which may include sick leave, vacation time, or personal days, depending on their role. If an employee exhausts all available paid leave and experiences an emergency or extenuating circumstance that requires additional time off, they may submit a request for an unpaid personal leave of absence, subject to the conditions outlined below.

**1. Request and Approval Process for Long-Term Leave**

For long term unpaid personal leave of absence, employees must submit a written request for unpaid personal leave to the President at least four (4) weeks in advance of the desired start date for extended leave.

Approval is not automatic and will be considered on a case-by-case basis by the President, taking into account:

- Length of employment at LPI
- Nature and responsibilities of the employee's position
- Current needs and operational impact on the school
- Employee's attendance and performance history
- Reason and urgency for the leave request

Personal leave may be granted for a period of up to one (1) month, provided all conditions are met and adequate notice is given.

**2. Leave Duration and Position Guarantee**

- For personal leave of between 15 to 21 days, LPI will make a reasonable effort to hold the employee's position or assign a comparable position upon return- if available.
- For leave of up to 30 days, LPI cannot guarantee the same or a similar position will be available when the employee is ready to return.

**3. Benefits and Employee Responsibilities During Leave**

- While on unpaid personal leave, employees will not accrue additional sick leave or vacation time.
- Employees are responsible for continuing their health insurance coverage by paying their portion of the monthly premium.

#### **4. Return to Work Notification**

- Employees must notify the school of their intention to return to work at least two (2) weeks prior to the scheduled return date or as otherwise agreed upon with the President.
- Failure to return to work on the next scheduled workday following the expiration of the approved leave—without prior written notice—will be considered a voluntary resignation.

#### **5. Single-Day Unpaid Leave Requests**

In situations where an employee needs to take one or a few individual days off and has no remaining PTO, a request for unpaid leave may be submitted in writing to the employee's immediate supervisor and approved by the President as far in advance as possible.

- Approval will be based on school needs and the employee's attendance history.
- Habitual use of unpaid single days without a valid reason may result in corrective action.
- Any approved unpaid day(s) must still be properly recorded through the school's leave documentation process.

This policy is designed to balance the needs of the employee with the operational needs of LPI. It is the employee's responsibility to remain in communication with the school during their leave and to comply with all requirements outlined above.

Accrual of time off will not continue during any Leave without Pay absences. Accrual of time off will cease and will resume upon the employee's return to work. At termination of employment, employees will not be paid for any unused vacation days.

**SECTION: Employment Benefits**  
**POLICY: Educational Opportunities**  
**POLICY #: 5.13**

**Educational Opportunities**

Upon completion of one year of service at the school, each employee is eligible for an annual tuition grant of up to \$200.00. This grant can be used to enroll at an accredited college or university, or for participation in training and workshops at Region 19. Furthermore, LPI offers tuition-free enrollment for children and personnel dependents.

# **SECTION 6: EMPLOYEE COMPENSATION**

**SECTION: Employment Compensation**  
**POLICY: Wage and Salary**  
**POLICY #: 6.01**

**Wage and Salary**

School employees are compensated according to carefully crafted administrative guidelines and a well-defined pay structure. Lydia Patterson Institute board diligently reviews the pay plans each year, making necessary adjustments. All district positions are clearly categorized as either exempt or nonexempt in accordance with federal law. Professional employees and academic administrators are typically considered exempt and receive monthly salaries without overtime pay. Other employees are typically considered nonexempt and are compensated hourly or with an annual salary, and they receive compensatory time or overtime pay for any hours worked beyond 40 in a workweek.

All employees will receive written notice of their pay and work schedules before the start of each school year. Classroom faculty and full-time counselors will be paid no less than the minimum state salary schedule. Employees should contact the President if they have any questions about the school pay schedules or their own pay.

Employees have the right to request and receive information about the salary range applicable to their current position. They should also be informed of the salary range for any position they apply for within the organization. However, employees are not entitled to information about salary ranges that are unrelated to their current employment situation.

The President is responsible for overseeing all wage and salary programs and for establishing and communicating specific guidelines and policies for their implementation. Additionally, for annual salary adjustments, Lydia Patterson Institute has designated September 1 as the anniversary date for all employees.

**SECTION: Employment Compensation  
POLICY: Club Advisor Stipends  
POLICY #: 6.02**

**Club Advisor Stipends**

Lydia Patterson Institute (LPI) recognizes the important role that student clubs and organizations play in enriching the educational experience and fostering leadership, teamwork, and community engagement. Faculty and staff who serve as club advisors dedicate significant time and effort to supporting students in these activities. To honor this service, LPI provides stipends for approved club advisors in accordance with the following policy.

**1. Eligibility**

- Stipends are available to faculty and staff formally appointed by the administration to serve as advisors for approved student clubs or organizations.
- Advisors must remain active in their role throughout the semester to receive payment for that semester.
- Advisors who resign, are reassigned, or are removed from their role prior to the end of a semester will forfeit the stipend installment for that period.

**2. Stipend Amount and Distribution**

- The stipend amount is determined annually by the administration and communicated in writing to each advisor.
- Stipends are distributed in two equal installments:
  - **First Half:** Paid with the advisor's last paycheck of the fall semester.
  - **Second Half:** Paid with the advisor's last paycheck of the spring semester.
- Payment is contingent upon timely submission of required documentation (see Section 3).

**3. Documentation and Requirements for Payment**

To receive stipend payments, club advisors must submit the following to the Business Office and Administration:

**A. Club Roster**

- a. A complete roster of all student members, updated each semester.

**B. Club Syllabus/Plan**

- a. A document listing planned activities, projects, or events for the year.
- b. Expectations for both students and parents (e.g., participation requirements, behavior standards, meeting schedules).

**C. Parent/Student Agreement**

- a. Signed acknowledgment forms from parents and students, agreeing to the expectations outlined in the club syllabus.

**D. Attendance/Meeting Logs**

- a. Records of meetings held, including dates, times, and a brief description of activities.

**E. Event/Activity Documentation**

- a. Evidence that the club has carried out the planned activities (e.g., flyers, photos, student sign-in sheets, or short activity reports).

**F. Budget and Fundraising Reports (if applicable)**

- a. A simple record of funds raised and expenditures, with all proceeds submitted to the Business Office for proper accounting.

**G. End-of-Semester Report**

- a. A brief summary highlighting the club's activities, accomplishments, and student participation during the semester.

**4. Accountability and Oversight**

- The Administration and Business Office will review submitted documentation each semester before releasing stipend payments.
- Failure to submit required materials by designated deadlines will result in withholding or forfeiture of stipend payments.
- Stipend continuation is contingent upon:
  - Compliance with all LPI policies regarding student conduct, supervision, and use of facilities.
  - Evidence of meaningful student engagement and fulfillment of the club's stated purpose.

**5. Alignment with LPI Mission**

All club activities and advisor responsibilities must support the mission and values of Lydia Patterson Institute. Clubs are expected to foster student growth, uphold academic and behavioral standards, and contribute positively to the school community.

**SECTION: Employment Compensation  
POLICY: Athletic Coaches Stipends  
POLICY #: 6.03**

**Athletic Coach Stipends**

Lydia Patterson Institute (LPI) values the dedication of its athletic coaches who provide leadership, mentorship, and training to student-athletes. Coaches play a critical role in advancing Lydia Patterson Institute's mission by fostering teamwork, discipline, character development, and school spirit through athletics. To recognize their contributions, LPI provides stipends to approved athletic coaches in accordance with the following policy.

**1. Eligibility**

- Stipends are available to individuals formally appointed by the administration as coaches or assistant coaches for LPI's athletic teams.
- Coaches must remain active through the full duration of the season to receive the full stipend.
- Coaches who resign, are reassigned, or are removed from their position before the end of the season will forfeit any unpaid portion of the stipend.

**2. Stipend Amount and Distribution**

- Stipend amounts are determined annually by the administration and communicated in writing at the time of appointment.
- Stipends will be distributed in two equal installments per season:
  - **First Half:** Paid on the first paycheck after the particular season starts.
  - **Second Half:** Paid two weeks after the season concludes.
- Payment is contingent upon timely submission of all required documentation (see Section 3).

**3. Documentation and Requirements for Payment**

To receive stipend payments, coaches must submit the following to the Athletics Department, Business Office, and Administration:

**A. Team Roster**

- a. A complete roster of all student-athletes, updated as needed throughout the season.

**B. Season Plan/Syllabus**

- a. A document outlining the season's schedule, training plans, games/meets, and program expectations for both athletes and parents.

**C. Parent/Student Agreement**

- a. Signed acknowledgment forms from parents and athletes, agreeing to expectations such as attendance, sportsmanship, conduct, and academic eligibility requirements.

**D. Attendance/Practice Logs**

- a. Records of practices, conditioning sessions, and meetings held, including dates and brief notes.

**E. Event/Game Documentation**

- a. Records confirming team participation in scheduled games or matches (e.g., schedules, scores, or reports).

**F. Budget and Fundraising Reports (if applicable)**

- a. A simple record of funds raised and expenditures, with all proceeds submitted to the Business Office for proper accounting.

**G. End-of-Season Report**

- a. A summary highlighting the season's activities, accomplishments, athlete participation, and areas for improvement.

**4. Accountability and Oversight**

- The Athletic Director, Administration, and Business Office will review submitted documentation before releasing stipend payments.
- Failure to meet documentation deadlines or responsibilities may result in withholding or forfeiture of stipend payments.
- Coaches must comply with all LPI policies, including those on student safety, transportation, supervision, and athletic eligibility.

**5. Alignment with LPI Mission**

Athletic programs are an extension of the educational mission of Lydia Patterson Institute. Coaches are expected to:

- Model and promote values of integrity, teamwork, discipline, and resilience.
- Ensure the health, safety, and dignity of all student-athletes.
- Represent LPI positively in all athletic competitions and community settings.

**SECTION: Employment Compensation**  
**POLICY: Substitute Compensation**  
**POLICY #: 6.04**

**Substitute Compensation**

Lydia Patterson Institute (LPI) values the essential role of substitute teachers in maintaining continuity of instruction. Every attempt should first be made to cover classes with available faculty before calling in a substitute.

To ensure fairness and clarity, the following policy applies:

2. Minimum Compensation

- Once a substitute teacher is called in and reports to work, they will be compensated for a minimum of four (4) hours.
- This policy applies even if the substitute's services are required for less than four hours (for example, 30 minutes).

3. Scheduling and Utilization

- Substitutes should only be called in when their support is truly needed.
- Supervisors and staff are responsible for carefully assessing the situation before requesting a substitute in order to avoid unnecessary costs.

Substitute teachers commit their time and availability once they accept an assignment and report to campus. To respect their commitment, we ensure they receive fair compensation with a four-hour minimum. At the same time, this policy carries financial responsibility for the school. Therefore, every effort must first be made to cover classes using available faculty and staff before calling in a substitute. Substitutes should only be requested when coverage cannot be reasonably provided in-house.

This approach balances fairness to substitutes with stewardship of school resources, ensuring substitutes are used wisely and appropriately.

4. Accountability

Requests for substitutes should be made through the proper channels and only after confirming that internal coverage is not possible.

**SECTION: Employment Compensation**  
**POLICY: Paychecks**  
**POLICY #: 6.05**

**Paychecks**

Lydia Patterson Institute has a pay cycle that operates a semi-monthly basis, with all employees being paid semi-monthly. If a payday falls on a holiday, paychecks will be issued on the preceding workday.

All employees will receive their pay through direct deposit. All earnings are available for viewing in the praxis portal. However, a Request for Written Earnings Form will be provided to employees when they request the information in writing.

Employees have the convenient option to have paychecks deposited directly into a designated account. To change bank accounts, the employee must make the request at the Business Office by filling out a Direct Deposit Form.

**SECTION: Employment Compensation**  
**POLICY: Payroll Deductions**  
**POLICY #: 6.06**

**Payroll Deductions**

The school is required to make the following automatic payroll deductions:

- Federal income tax is required for all employees.
- Medicare tax (applicable only to employees hired after March 31, 1986)
- Social Security program under the Federal Insurance Contribution
- Child support and spousal maintenance, (if applicable)

**SECTION: Employment Compensation**  
**POLICY: Overtime Compensation**  
**POLICY #: 6.07**

**Overtime Compensation**

Non-exempt employees will be compensated for their first 40 hours of work in a single week at their standard hourly rate. Prior written approval from the supervisor and/or the President of Lydia Patterson Institute is required for any overtime. Any unapproved overtime hours will be compensated but will result in a performance notification by the supervisor. Any hours worked beyond 40 in a week will be paid at 1.5 times their regular hourly rate. Leave hours such as vacation, holidays, and sick leave will not be factored into the overtime calculation.

All non-exempt employees are required to complete a daily time record to monitor their work hours, which will be used for payroll computation. Every worked hour should be accurately documented on the timecard. Working off the clock is strictly prohibited. Each employee is responsible for ensuring the accuracy of their time records. Any form of tampering or falsifying time records is strictly prohibited and may result in termination.

**SECTION: Employment Compensation**  
**POLICY: Travel Expense Reimbursement**  
**POLICY #: 6.08**

**Travel Expense Reimbursement**

Employees must obtain written approval from their supervisor before incurring any travel expenses. Once approved, employees will be reimbursed for mileage and other travel costs based on the current rate schedule set by the board. To receive reimbursement for allowable expenses other than mileage, employees must submit receipts for all transactions.

**SECTION: Employment Compensation  
POLICY: Workers' Compensation Insurance  
POLICY #: 6.09**

**Workers' Compensation Insurance**

The school complies with state law by offering workers' compensation benefits to employees who experience work-related illnesses or injuries. The school is covered by workers' compensation from Texas Mutual, ensuring that employees receive assistance for medical treatment and partial replacement of lost income during the recovery period. The specific benefits are determined by law and vary based on individual circumstances. It is important to report all work-related accidents or injuries promptly. Employees unable to work due to work-related injuries will be informed of their rights and obligations under the Texas Labor Code.

Employees are obligated to fulfill certain legal requirements in order to establish a claim, which includes the following:

- The employee is required to inform their supervisor of the initial evident symptoms of an occupational injury within 30 days of the injury or the first clear symptoms.
- The employee must submit a Notice of Injury or Occupational Disease and file a Compensation claim with the Industrial Accidents Board within 1 year of the injury or the first clear symptoms of the occupational disease.
- 

Failure to report the injury or initial symptoms of an occupational disease within 30 days may result in the school and the Worker's Compensation Division being relieved of their legal responsibilities.

All Workers' Compensation claims will be managed through the president's office.

**SECTION: Employment Compensation**  
**POLICY: Teacher Retirement**  
**POLICY #: 6.10**

**Teacher Retirement**

Lydia Patterson Institute offers a sponsored traditional 403(b) retirement policy for its full-time employees that help employees save for retirement.

Under the 403(b) all employees receive a 7% contribution from LPI. Employees do not have to match this contribution but if they choose to contribute employees can choose how much money they want to contribute to their plans, either a percentage of their salary or a set dollar amount, and that money will be taken out of your paycheck.

A 403(b) has contribution limits. For 2024, the total contribution limit for a 403(b) is \$23,000. But if you're age 50 or older and need to catch up, you can put up to \$30,500 into your account. The maximum amount that can be contributed to your 403(b) in 2024 between your contributions and your employer's contributions is \$69,000 per year (or \$76,500, if you're 50 or older) or your full annual salary—whichever amount is smaller.  
Withdrawals and Penalties

If you make a withdrawal (also called a distribution) from your 403(b) before you're 59 1/2, you'll have to pay a 10% early withdrawal penalty. In addition, you will have to pay taxes on those withdrawals. For more information, the Business Office will provide you with the contact for the third-party provider.

# **SECTION 7: EMPLOYEE DISCIPLINE**

**SECTION: Employee Discipline**  
**POLICY: Employee Progressive Discipline**  
**POLICY #: 7.01**

**Employee Progressive Discipline**

Lydia Patterson Institute wants to give employees a chance to correct their behavior when possible and assist them in the process. We also want to ensure that serious offenses are thoroughly investigated and dealt with. LPI Institute strives to provide an objective and specific problem-solving procedure for use when an employee disciplinary action becomes necessary. If an employee fails to follow an established policy and procedure it is essential that the employee be encouraged by his/her supervisor to understand and correct the problem.

This policy is designed to give notice to employees regarding problem situations, provide communication on how to correct the problems, and establish a time frame for the achievement of the required change. Depending on the seriousness of the problem and after consultation with the President, one or more steps of the progressive discipline process may be skipped which could result in immediate termination.

The type of corrective action employed depends upon the seriousness of the situation. A policy following a Progressive Cycle Process appropriate to the situation may be followed in most cases. However, LPI reserves the right to proceed directly to a written warning, or demotion, or termination for misconduct or performance deficiency, without resorting to prior disciplinary steps, when the school deems such action appropriate.

This policy applies to all our employees. Our disciplinary process has five steps of increasing strictness. These steps are:

1. Verbal warning
2. Informal meeting with supervisor
3. Formal reprimand
4. Formal disciplinary meeting
5. Termination

All these phases are official and managers should document them. President's office must also receive copies and keep records of the process.

Supervisors should let employees know when they launch a progressive discipline procedure. For example, pointing out a performance issue is not necessarily a verbal warning and may be part of the regular feedback an employee receives. If supervisor judge that a progressive disciplinary process is appropriate, they must clarify this to their team member and document the step.

Each step may be repeated instead of moving forward to the next step at supervisor's or President's discretion. For example, a supervisor may choose to have more than one informal meeting with their employees (step 2) before issuing a formal reprimand (step 3.)

Supervisors can make the decision to repeat a step if they:

- Feel that the step was not properly executed the first time.
- See signs of improvement in their employee and want to help them further.
- Believe conditions or parameters change enough to make repeating the step necessary.

Explaining the steps

- Step 1: When a Supervisor issues a verbal warning to an employee, they should do so privately. When appropriate, they should provide that employee with a copy of the school policy they violated, and explain progressive discipline steps. Supervisors should provide employees with any coaching or advice they need.

Employees have two (2) weeks to correct their behavior before step 2 takes effect.

- Step 2: A supervisor (or President) discusses corrective actions with an employee. Employees should receive actionable feedback on how to deal with an unintentional violation. They can review coaching or mentoring methods.

Employees have two weeks (2) to correct their behavior before step 3 takes effect.

- Step 3: Employees receive a formal written reprimand from supervisor, President will be present.

President will inform them that if they do not correct their behavior within two (2) weeks, step 4 will take effect.

- Step 4: Employees will be called in for a formal disciplinary meeting with President, their Department Head and/or their supervisor. They will have the chance to explain their side. President must clarify that this is the final step before an employee is penalized.

Employees must correct their behavior immediately, or step 5 takes effect.

- Step 5: Employees who continue to violate policies, either voluntarily or involuntarily, by this stage will be terminated. This step will follow an official investigation by President (or legal authorities when appropriate) to ensure that terminating an employee is fair.

The progressive discipline process may begin from a different step, according to the severity of an employee's misconduct:

**Performance issues.** Procedure starts at stage 1. Examples are:

- Absenteeism.
- Disregarding deadlines.
- Lack of knowledge of Health & Safety standards.

**Minor offenses (one-time).** Procedure starts at stage 1. Examples are:

- On-the-job minor mistakes.
- Breach of dress code or smoking policy.

**Serious misconduct/Repeating an offense for which a progressive discipline procedure already took place.** Procedure starts at stage 3. Examples are:

- On-the-job major mistakes.
- Rudeness to colleagues, public or stakeholders.
- Unwillingness to follow policies.

**Severe violations.** Procedure starts at stage 5. Examples are:

- Substance abuse.
- Offensive behavior.
- Retaliation against an employee.

**Illegal behavior.** Procedure starts at step 5. Examples are:

- Corruption/ Bribery.
- Sexual Harassment.
- Workplace Violence.
- Embezzlement/Fraud.

President can skip any of the steps if s/he believes they are obsolete. For example, if an employee has received several formal reprimands for the same offense, President may choose to terminate them directly.

This policy is meant to provide general guidelines. Our school reserves the right to treat circumstances in a different way from that described in this policy. But, we are always obliged to act fairly and lawfully and document every stage of the progressive discipline process.

### **Termination**

An employee may be terminated involuntarily for reasons that may include poor performance, misconduct, or other violations of the school's rules of conduct. However, the school reserves the right to discharge or demote any employee with or without cause and with or without prior notice.

**SECTION: Employee Discipline**  
**POLICY: Employee Resignation**  
**POLICY #: 7.02**

**Employee Resignation**

When an employee decides to resign due to illness or personal reasons, LPI may consider a leave of absence if the employee has a positive work record and sufficient length of service. The employee is expected to provide at least two weeks' notice for non-exempt employees and 30 days' notice for exempt employees before voluntarily ending their employment. Teachers are expected to provide at 30 days' notice as stated in their contract. All Lydia Patterson Institute property must be returned before the employee receives their final paycheck. If an employee resigns, their paycheck will be issued on the next regular payday in person. In the case of termination, the employee will receive their final paycheck for all wages owed within six (6) days of termination.

**Exit Interview and Procedures:** Upon departure from LPI, exit interviews will be arranged for all departing employees. At this time, information regarding the continuation of benefits, the release of information, and the procedure for requesting references will be provided. Departing employees are kindly requested to furnish LPI with a forwarding address and phone number and to complete a questionnaire offering feedback on their employment experience. It is imperative that all keys, books, property (including intellectual property), and equipment be returned upon separation from employment.

If an employee is absent for three (3) business days without notice to the school, it will be assumed that s/he has voluntarily resigned.

**SECTION: Employee Discipline**  
**POLICY: Employee Concerns Process**  
**POLICY #: 7.03**

**Employee Concerns Process**

We are committed to providing the best possible working conditions for our employees, including an open and respectful atmosphere. Our grievance policy ensures prompt and appropriate responses to any problems, complaints, suggestions, or questions. We also aim to prevent any form of unlawful or inappropriate conduct, and we have procedures in place to address any adverse employment actions.

LPI philosophy is that problems and misunderstandings which may arise concerning employment can best be solved through communication. LPI is committed to providing the best possible working conditions for its employees. Part of this commitment is to encourage an open and frank atmosphere in which any problem, complaint, suggestion, or question receives a prompt, appropriate, and consistent response, and where necessary, appropriate remedial action. Supervisors and employees are expected to treat each other with mutual respect.

Not every problem can be resolved to everyone's total satisfaction, but only through understanding and discussion of mutual problems can we develop and maintain confidence in each other. This confidence is important to the operation of an efficient and harmonious work environment. No employee will be penalized, formally or informally, for raising issues in good faith.

While many issues are the result of misunderstanding, employees are encouraged to first attempt resolution through informal discussion. However, you do NOT have to directly engage any individual or group you feel may be the cause of the issue if you do not feel comfortable doing so.

When a problem or question arises, an employee's first course of action should be to discuss it with immediate supervisor. If satisfactory resolution has not been resolved at this level or if there are circumstances that make it difficult for employee to talk with supervisor, employee may take his/her concern to the next level of management. In the event the concern is still not resolved to the employee's satisfaction, employee may refer the matter to the President whose decision is final.

Grievance and Remedial process is as follows:

1. Students/parents to teachers:
  - a. All concerns about the classroom must first be presented to the teacher by the parents, or if the student is mature enough, by the student himself. If

the student presents the concern, a respectful demeanor is required by faculty at all times.

- b. If the problem is not resolved, the parents or student may bring the concern to the Principal/department head. If the student brings the concern, he must have permission from his parents to do so.
  - c. If the problem is still not resolved, the parents should appeal the decision by requesting a hearing from the President.
2. Parents/patrons to President:
- a. If parents or patrons have a grievance or dispute about the general operation of the school (apart from the operation of the classrooms), they should bring their concerns to the President.
  - b. If the situation is not resolved, they should request a hearing from the President.
3. Volunteers to Staff/Administration:
- a. If any volunteer has a concern about the volunteer work, he will present that concern to the staff member responsible for his oversight.
  - b. If the problem is not resolved, then the concern should be presented in writing to the President, followed by a meeting with him/her to discuss the concern.
4. Employee to Other Employee
- a. Step One: It is important that all concerns/complaints be raised in a timely manner. The employee should bring the situation to the attention of their immediate supervisor in writing, explaining the nature of the problem and the requested solution if the employee has one. If the concern/complaint is directed toward a specific supervisor who would otherwise be the appropriate recipient, the employee should report the matter in writing directly to the President.

Absent unusual circumstances (the unusual circumstance will be reviewed and addressed by the President and will consider applicable employment laws), the written concern/complaint should be presented within fifteen business days of the occurrence of the problem creating or circumstances giving rise to the matter. Concerns/complaints presented after fifteen days may cause an inability to appropriately address the concern/complaint. The concern / complaint potentially could be dismissed because of the delay. It is important that the written concern/complaint is clear and complete, as additional issues may not be asserted later in the Problem Resolution process if they have not been identified at this initial stage.

After being informed of the concern/complaint, the supervisor will determine the appropriate individual to address the concern/complaint and that person will investigate and provide a written response to the employee. Typically, the written response will be provided within ten

business days, depending upon the time necessary to investigate and evaluate the concern/complaint.

- b. Step Two: If the employee is not satisfied with the response or resolution provided in the first step, the employee will be allowed five business days to present the concern/complaint, in writing, to the supervisor. The employee may include reasons why the employee disagrees with the initial response but may not raise additional matters outside the original written concern/complaint.

The supervisor or the appropriate representative will review the concern/complaint and response, conduct further investigation if necessary, and provide a written response to the employee. Typically, the response will be provided within five business days of presentation of the concern/complaint, depending upon the time necessary to investigate and evaluate the concern/complaint.

- c. Step Three: If the employee is dissatisfied with the response or resolution provided in the second step, the employee will have an additional ten business days to present the concern/complaint, in writing, to the President of Lydia Patterson Institute. The employee may include reasons why the employee disagrees with the response but may not raise additional matters outside the original written concern/complaint.

Upon receiving the written concern/complaint, the President of Lydia Patterson Institute will review the actions taken pursuant to steps 1 and 2. The President of Lydia Patterson Institute may, at his/her discretion:

- Talk with the employee to get further clarification of the problem;
- Talk with the supervisor or department head to get further clarification of the problem; or
- Schedule a meeting between the employee, the supervisor, and the President or other appropriate representative (both the employee and the supervisor).
- After careful consideration, but within ten business days, the President of Lydia Patterson Institute will render a final decision in writing to the employee. The President shall file a copy of the report.

At all levels of the process, LPI will undertake an objective and appropriate review of the concern/complaint and expect all employees to fully cooperate with any investigation that may be initiated to examine the matter. To the extent practicable and appropriate, we will keep any complaint and the terms of its resolution confidential. We will take corrective action as we determine is appropriate, including such discipline up to and including immediate termination of employment. We will undertake corrective action to stop inappropriate conduct before it rises to the level of an unlawful action. Employees will be notified as to the resolution of their concern or complaint to the extent appropriate while maintaining appropriate confidentiality of all individuals involved.

False accusations of misconduct can have serious detrimental effects and employees are cautioned to not make such claims based solely on hearsay, speculation and/or innuendo. While concerns raised in good faith will not result in disciplinary action simply because they are unsubstantiated, an employee making knowingly false accusations will be appropriately disciplined up to and including termination of employment. We encourage any employee to raise questions they may have regarding misconduct or this Policy with their supervisor or the President.

It is understood that if any disputes arise which are not covered by this policy, the President will decide what procedures to follow based on a parity of reasoning from those procedures established by this policy.

# **SECTION 8: SAFETY AND SECURITY**

**SECTION: Safety & Security**  
**POLICY: School Visitors &**  
**Front Reception**  
**POLICY #: 8.01**

**School Visitors and Front Reception**

Parents, alumni and visitors are always welcome at Lydia Patterson Institute. The safety of our students is of utmost importance.

All visitors, including parents, are required to report to the Front Office to sign in. All visitors must leave a current driver's license or formal ID in exchange for a visitor's pass. With the exception of Mission Groups arranged by the Development department.

Authorized visitors, those that have a previous scheduled meeting, will be escorted to their intended destination. In the event that any employees encounter an unauthorized individual on the school premises, they are requested to promptly take them to the front office.

**Visitor Approval and Identification**

- Lydia Patterson is a closed campus. Visitors must wear a visitor's badge while on campus.
- All visitors are required to sign in at the main building reception desk, present a valid driver's license, and receive a visitor's badge.
- Lydia Patterson Institute may, at its sole discretion, deny any visitor access to campus at any time.
- Visitors without a valid identification will only be allowed access to the main building office area.
- Visitors not displaying a badge will be required to return to the main building reception desk.
- Upon leaving campus, visitors must return their badge and sign out at the main building desk.
- Parents/visitors may only go to classrooms during school hours at the invitation of LPI Principal and are not allowed in a classroom unattended.

**Visitor Alert Procedure**

If the front desk clerk identifies an issue, they shall contact Business Office and other designated responders.

Lydia Patterson Institute employees must wear their ID badge upon entering the school.

LPI wants visitors to feel welcome in our school and to witness the engaging activities taking place in our classrooms. The following procedures apply for any visitor to visit a

classroom:

- Classroom visits will only be permitted when approved by the Principal and as long as their duration and/or frequency does not interfere with the delivery of instruction or disrupt the normal school environment.
- This policy does not apply to those who, by law, are permitted to visit with children.
- Only school employees and students are allowed on the playground during school hours.

Volunteers must complete a criminal background check. This may take a minimum of 2 weeks to process. Volunteers must reapply every year.

### **Substitute Employees**

Substitutes are required to sign in and wear a substitute badge while on campus. Upon leaving campus, substitutes must return their badge and sign out at the main building.

### **Contractors and Vendors**

Contractors and vendors who will only be working outside the buildings or who do not need to go past the main reception area will not be required to sign in or wear a visitor badge. If the contractor or vendor must access any other parts of the campus, they must be escorted by LPI employee at all times, or they must scan leave their valid ID in the front desk and receive a visitor badge. In case of an emergency inside or outside, contractors and vendors with administrator authorization may go directly to the site of the problem.

### **Large Events during the School Day**

Large campus-wide events held during normal school hours, including but not limited to, pep rallies or school performances, may have modified visitor check-in procedures.

### **Restraining Orders**

Restraining orders due to legal or custody proceedings shall be communicated to the President/Head of School, receptionist, Principals, and pertinent faculty members. A complete, file-stamped copy of the Court Order must be provided to the President/Head of School. If a restricted person arrives attempting to contact a student or person on campus, the receptionist shall follow the visitor alert procedure and contact the Business Office and President/Head of School.

### **Employee Deliveries**

If an employee is expecting a delivery, the employee should notify the front desk receptionist in advance providing the carrier and the expected delivery date. Delivery drivers will not be permitted anywhere on campus other than the main building reception area.

### **Food Orders**

Only employees are allowed to order outside food during the school day. If an

employee does so, please notify the front desk receptionist in advance. All money and/or tip should be brought to the front desk in advance, as deliveries tend to arrive earlier than requested. Delivery drivers will not be permitted anywhere on campus other than the main building reception area. Students may not have food, drinks or other items delivered to or near campus. No food is permitted in classrooms.

### **Forgotten Items and Student Deliveries**

Parents may drop off forgotten items. These items will be labeled with the student's name and placed at the front desk. We do not call into classrooms or call students out of class. When possible, an email is sent to the teacher to notify the student. It is at the discretion of the teacher when to release the student to retrieve the items. Delivery of flowers, balloons and gifts for students will be held until the end of the day.

**SECTION: Safety & Security**  
**POLICY: Campus Safety Program**  
**POLICY #: 8.02**

**Campus Safety Program**

**Emergency Operations Policy**

Lydia Patterson Institute (LPI) is committed to protecting the safety and well-being of its students, faculty, staff, and visitors. To ensure preparedness and coordinated response, LPI has adopted a comprehensive Emergency Operations Plan (EOP).

All employees are required to read and familiarize themselves with the Emergency Operations Plan. The plan includes emergency procedures in the event of fire, inclement weather, and other emergencies requiring evacuation or securing of buildings. Practice drills will be conducted throughout the year in conjunction with state and local requirements. Emergency folders shall be kept in each classroom/office.

All employees are required to be familiar with and follow the EOP. This plan outlines procedures for responding to a variety of emergencies, including but not limited to: fire, severe weather, medical emergencies, active threats, evacuation, shelter-in-place situations, and public health concerns.

**Key Policy Provisions:**

- **Compliance:** All faculty and staff must comply with the EOP and participate in required emergency drills and trainings.
- **Communication:** Employees must use official school communication channels (intercom, radios, email, WhatsApp staff groups, and the parent notification system) to receive and relay emergency instructions. Personal social media must not be used for unverified emergency communication.
- **Faculty Responsibilities:** Teachers and staff are responsible for knowing evacuation routes, accounting for students during emergencies, and maintaining a calm and professional environment during crises.
- **Drills:** Fire, lockdown, severe weather, evacuation, and shelter-in-place drills will be conducted on a regular basis. All employees must actively participate and assist students.
- **Continuity of Operations:** In the event of a prolonged disruption, remote learning and essential operations will continue in accordance with the EOP.
- **Annual Review:** The EOP will be reviewed and updated annually by the Emergency Response Team.

Failure to follow emergency procedures, participate in drills, or comply with the EOP may result in corrective action, as such compliance is considered a condition of employment.

**SECTION: Security & Safety**  
**POLICY: Inclement Weather**  
**POLICY #: 8.03**

**Inclement Weather**

Inclement weather or emergency circumstances may require the school to close. The school administration will be responsible for making official decisions regarding closures. Lydia Patterson will generally close on the same days as the three main Independent School Districts, for inclement weather; however, there may be times that Lydia Patterson is closed when ISDs are not. Lydia Patterson will make every effort to communicate school closure information through the school website, social media, text, email, telephone, and local media outlets. During a severe weather warning, students will generally not be released until the threat has passed unless Lydia Patterson has received written or verbal parental consent for departure.

**SECTION: Security & Safety**  
**POLICY: Firearms & Weapons**  
**POLICY #: 8.04**

**Firearms & Weapons**

Possession, whether intentional or unintentional, of any weapons of any kind, including but not limited to firearms, ammunition, handguns, knives, chemical dispensing devices, any other weapons, prohibited inhalants or explosives is prohibited on any Lydia Patterson property including but not limited to buildings, driveways, sidewalks or walkways, parking lots, and fields or at any location where an employee is performing duties for Lydia Patterson. This prohibition also applies to such items being stored in an employee's locked motor vehicle or school vehicles. This prohibition does not apply to duly licensed law officers or security personnel while on duty. It does however apply to all employees, parents, students, agents, independent contractors, clients, and visitors, even if they have a license from any state to carry a weapon regardless of whether the weapon is concealed.

Any violators may be subject to immediate removal from the premises or other individuals as necessary. Disciplinary action, up to and including termination of employment, suspension or expulsion of students, or banning visitors from school property.

To uphold the safety of all individuals, employees who witness or suspect a violation of the school's weapon policy are encouraged to report it to the HR/President or call 911 immediately.

**SECTION: Security & Safety**  
**POLICY: Campus Monitoring**  
**POLICY #: 8.05**

**Campus Monitoring/Searches**

Lydia Patterson Institute reserves the right to conduct searches of any employee, visitor, or volunteer's personal belongings, desk, or vehicle. This measure is taken when there is reasonable suspicion that prohibited items may be in the possession of the aforementioned individuals. The Institute maintains the right to conduct these searches to ensure the safety and security of all individuals present on the premises. It is therefore expected that all members on the school grounds will comply with this reasonable measure.

Lydia Patterson Institute may conduct monitoring and/or searches to help ensure employee and student safety, including video surveillance of non-private areas to identify safety concerns, maintain security, detect theft and misconduct, and discourage and prevent acts of harassment and violence. Aside from bathrooms and locker rooms, students, employees, and visitors must have no expectation of privacy with regard to any area of Lydia Patterson Institute's facilities and other property. Lydia Patterson may search any portion of any School facility or other property without limitation including but not limited to: employees' offices, desks, files, classrooms, lockers, electronic devices, any other personal article on Lydia Patterson Institute premises, or vehicles parked on campus.

**Use/Access of Video Recordings**

Recordings shall be reviewed as needed by Administrators, and evidence of misconduct shall be documented.

**Personal Device Recordings**

Audio or video recording is prohibited on the LPI campus without the prior approval of administration and written consent of those being recorded. No photography, audio or video recording is permitted in bathrooms or locker rooms under any circumstances.

**Threats or Acts of Violence**

Threats of violence or acts of violence by a student, employee, parent or other individual may be reported to law enforcement and any other authorities the School deems appropriate. Lydia Patterson Institute will cooperate with investigations by authorities, and the School may also conduct its own investigation.

## **Drug Free Workplace**

### **Tobacco**

Lydia Patterson Institute is a smoke and tobacco-free campus. No smoking or any tobacco use is allowed in the buildings or on the grounds of Lydia Patterson Institute. In keeping with Lydia Patterson Institute's desire for employees to be Christian role models, no employee of Lydia Patterson will be allowed to smoke or use tobacco products, including vaping devices or e-cigarettes while attending or participating in any school function either on campus or away.

### **Drugs and Alcohol**

Lydia Patterson Institute is committed to maintaining a safe, healthy, productive work environment. Because of this commitment, the use, possession, transportation or sale of illegal drugs, or drug paraphernalia is prohibited on Lydia Patterson property.

Employees are prohibited from consuming alcohol any time they are supervising students or are representing Lydia Patterson Institute or in the presence of students. Examples of prohibited conduct include, but are not limited to, the following:

- Reporting to work or working under the influence of alcohol or with illegal drugs in an employee's system.
- Drinking alcohol or smoking on campus or during any time when the employee is supervising students. For example, employees are prohibited from consuming alcohol while chaperoning students on overnight field trips or athletic competitions.
- Engaging in the illegal use, sale, dispensing, or possession of a drug at anytime and anywhere, either on or off duty.
- Misuse of prescription or over-the-counter medication, or the possession, use or misuse of synthetic, designer, organic, look-alike drugs or substances, household cleaners, or aerosol propellants.

Additionally, Lydia Patterson Institute will fulfill its reporting obligations regarding such behavior and cooperate with the authorities in any investigation of such behavior. For purposes of this Employee Handbook, the term drug includes all of the aforementioned items.

### **Commitment to a Drug-Free Workplace**

LPI is committed to maintaining a safe, drug-free environment for all employees, students, and visitors. Employees struggling with substance use are encouraged to seek support from medical, counseling, or faith-based resources.

**SECTION: Security & Safety**  
**POLICY: Drug Free Workplace**  
**POLICY #: 8.07**

**Employee Drug Test**

Lydia Patterson Institute may request an employee to undergo testing at the Institute's expense if there is probable cause to believe that the employee has a substance abuse problem or is under the influence of drugs or alcohol, thereby affecting their performance. Refusal to undergo such tests may lead to disciplinary action leading to termination. Lydia Patterson Institute will discuss the results of drug and alcohol screening only with individuals who require the information legally.

**SECTION: Security & Safety**  
**POLICY: Prescription Medications**  
**POLICY #: 8.08**

**Prescription Medications**

Prescription drugs in their original container, prescribed by a licensed physician as medication for use by the person possessing the medication, are permissible. However, the safety of our students must be a strong consideration. Keep all medication out of reach and unattainable by students.

If an employee is taking a legal drug or medication (such as over-the-counter or prescription medications) which the employee knows, or suspects may adversely affect judgment, coordination, or the ability to perform work in a safe and productive manner, the employee must notify the Principal or HR/President/Head of School. After reviewing the situation, the School's administration will decide whether to allow the employee to remain at work, impose work restrictions, or take other appropriate action to assure the safety and well-being of all individuals potentially impacted.

Any employee convicted of a controlled substance violation, including pleas of no contest, must inform Lydia Patterson Institute Administration within two days of such conviction or plea.

**SECTION: Security & Safety**  
**POLICY: Health Considerations**  
**POLICY #: 8.09**

**Health Considerations**

As a small school with fewer than 500 students, we do not have a full-time nurse on staff. Minor injuries or basic health concerns (such as small cuts, scrapes, or feeling unwell) will be addressed by trained staff using basic first aid procedures. In the event of more serious concerns, parents or emergency contacts will be notified promptly. For emergencies, 911 will be called. Families are encouraged to ensure that all student medical forms and emergency contact information are current and complete.

**Student or Employee Illness**

Students or employees exhibiting the following symptoms should stay home from school for the wellbeing of the school community and to prevent the spread of communicable diseases:

- Fever or temperature of 100.4 degrees or greater
- Uncontrolled Cough
- Shortness of breath or difficulty breathing
- Sore throat
- Vomiting, diarrhea or abdominal pain
- Severe headache
- Loss of taste or smell
- Muscle or body aches
- Other suspected contagious condition, including head lice
- Inability to remain in class due to injury

Lydia Patterson Institute will follow local health district guidelines for restriction from school or school closure and contact parents and employees with relevant details as appropriate.

Students and employees must be fever and symptom free for 24 hours without the use of symptom-reducing medication before returning to school.

Lydia Patterson Institute may require a doctor's note for the student or employee to return to school.

In the event of an outbreak of any vaccine preventable disease within our immediate and surrounding community, employees may be asked to inform the school of their vaccination history. Inclusion or exclusion from school for an employee will be guided by the recommendations of the CDC and Texas Department of Health. In the event of an outbreak or exposure, any employee who, for whatever reason, is not immunized may be excluded from school and all school-related activities.

**SECTION: Security & Safety**  
**POLICY: Administering Medication to Students**  
**POLICY #: 8.10**

**Administering Medication to Students**

This policy is implemented to ensure the safety and well-being of the student while maintaining a healthy environment for all individuals on campus. No student is permitted to have medication, whether prescription or over the counter, in their possession on school grounds during school hours. If a student requires medication during school hours, parents must bring it to the front office before the start of the school day. All medications must be in their original container with the original label intact. Additionally, a Medication Permit Form, providing instructions for administering the medication and signed by the parent/guardian and physician, must accompany the medication. These forms are available in the Front Office for parents' convenience. This policy ensures the safe administration of medication and compliance with regulatory requirements.

Students whose physician deems it necessary for them to carry medications such as an inhaler or an EpiPen on their person at all times may do so, provided that both the physician's and parent's consent is on file in the school's front office. This policy ensures that students with specific medical needs have access to necessary medications in case of emergency while maintaining proper documentation and adherence to safety protocols.

**SECTION: Security & Safety**  
**POLICY: Staff Injury/Illness on the Job**  
**POLICY #: 8.11**

**Staff Injury/Illness on the Job**

In the event of an on-the-job injury or illness, employees will promptly receive suitable medical care. Lydia Patterson is committed to adhering to all applicable federal, state, and local laws and regulations relating to occupational injuries or illnesses. We encourage the timely submission of the claim with a completed claim reporting form, which can be obtained from the HR/President. These reports will be forwarded to Lydia Patterson Institute Workers' Compensation carrier. It is important to gather comprehensive information about the incident, including the date and time, accident description, type of injury, and estimated damages. Failure to report an injury or illness as required by state law and company policy may lead to the loss of compensation benefits and potential corrective action, up to and including termination.

**SECTION: Security & Safety  
POLICY: Student Accident  
Insurance  
POLICY #: 8.12**

**Student Accident Insurance**

Lydia Patterson Institute (LPI) is committed to protecting the health and safety of every student. Despite careful supervision, accidents may occur during school or school-sponsored activities. To help families in these situations, LPI maintains a student accident insurance policy. This policy is designed to supplement, not replace, a family's primary health insurance.

**1. Coverage**

The School's accident insurance applies to injuries that occur under the following circumstances:

- On Campus: During regular school hours or supervised school activities.
- Sports and Athletics: While participating in official LPI practices, games, tournaments, or physical education classes under staff supervision.
- Travel to and from Events: While traveling in school-arranged or school-supervised transportation to a school-sponsored event or athletic competition.

**2. Sports-Related Accidents**

Sports activities involve physical risk. LPI's accident insurance provides secondary coverage for injuries sustained in LPI-sponsored practices, games, or supervised athletic training.

*Examples:* sprained ankle during soccer practice, concussion during a basketball game, injury during conditioning supervised by LPI staff.

**3. Travel-Related Accidents**

Coverage applies if a student is injured while traveling to or from a school-sponsored event in school-arranged or supervised transportation (e.g., bus, van, chartered vehicle).

Coverage does not apply if a student travels independently or by private arrangement outside of school supervision.

**4. Limitations of Coverage**

- The School's accident insurance is secondary. Families must file claims with their personal health insurance first.
- Parents/guardians remain financially responsible for any costs not covered by their insurance or the School's policy.
- Non-school-related injuries, illnesses, and pre-existing conditions are not covered.
- Private or club sports outside of LPI are not covered.

## **5. Families Without Insurance**

- If a family does not carry primary health insurance, Lydia Patterson Institute's accident policy will act as limited primary coverage, but it may not cover all expenses.
- LPI strongly recommends that families without health insurance purchase an individual student accident insurance plan to help cover medical costs, particularly if the student participates in sports or athletic programs, where the risk of injury is higher.
- Information about recommended student insurance options may be obtained from the Business Office.

## **6. Responsibilities**

### **Parents/Guardians:**

- Provide current health insurance information (or acknowledgment of no coverage) upon enrollment.
- File claims promptly and complete all necessary forms.
- Secure additional student insurance if no family coverage exists, especially for athletes.

### **School Staff/Administration:**

- Complete an Accident/Incident Report immediately following any accident.
- Provide claim forms and instructions to parents.
- Maintain communication throughout the claims process.

## **7. Acknowledgment**

By enrolling a student at LPI, parents/guardians acknowledge:

- Lydia Patterson Institute's insurance is secondary coverage.
- They remain primarily responsible for medical expenses.
- Families without personal health insurance are strongly encouraged to obtain student accident insurance, especially for athletic participation.

**SECTION: Security & Safety**  
**POLICY: Keys**  
**POLICY #: 8.13**

**Keys/ID Cards**

The Support Services Manager is responsible for issuing keys and signatures for all staff. Absolutely no keys will be issued to any employee without a "Key Check Out Form". The supervisor of the employee requesting the key must fill out the top half of the form and forward it to Support Services Manager who will issue the keys. The employee receiving the keys will sign the bottom of the form upon receipt of the keys. The form is filed in the employee's file until employment is terminated. All employee keys marked "Do Not Duplicate".

LPI employees are not to give their building key to anyone for any reason. Keys should be kept in a safe place. **NO DUPLICATE KEYS SHOULD BE MADE, EXCEPT BY THE SUPPORT SERVICES MANAGER.**

If a key/card is lost, please report this loss to the office immediately, lost keys/cards will be replaced at employee's expense of \$100.00 per key/gate card. If it is a master key the cost will be the total to rekey all doors that the key opens. All keys/cards must be returned at the close of the school year unless otherwise instructed.

Keys/cards should never be shared and only used by those they are issued to.  
Gate Entrance System

Security gates along the front fence of the campus should remain locked at all times. Gates may be temporarily secured in open position only for events approved through administration (e.g., supervised deliveries, sponsored after hours events).

All individuals receiving keys are required to return them at the conclusion of the school year (faculty) or at the termination of their employment. The employee's final paycheck will be withheld until all custody items including keys are accounted for. Keys may not be reproduced and any loss must be reported immediately. The Support Services Manager who will determine if re-keying is necessary

**SECTION: Security & Safety**  
**POLICY: Data Protection Policy**  
**POLICY #: 8.14**

**Data Protection Policy**

Our School Data Protection Policy refers to our commitment to treat information of employees, customers, stakeholders and other interested parties with the utmost care and confidentiality.

With this policy, we ensure that we gather, store and handle data fairly, transparently and with respect towards individual rights.

This policy refers to all parties (employees, job candidates, customers, suppliers etc.) who provide any amount of information to us.

Employees of our company and its subsidiaries must follow this policy. Contractors, consultants, partners and any other external entity are also covered. Generally, our policy refers to anyone we collaborate with or acts on our behalf and may need occasional access to data.

As part of our operations, we need to obtain and process information. This information includes any offline or online data that makes a person identifiable such as names, addresses, usernames and passwords, digital footprints, photographs, social security numbers, financial data etc.

Our school collects this information in a transparent way and only with the full cooperation and knowledge of interested parties. Once this information is available to us, the following rules apply.

Our data will be:

- Accurate and kept up-to-date
- Collected fairly and for lawful purposes only
- Processed by the company within its legal and moral boundaries
- Protected against any unauthorized or illegal access by internal or external parties

Our data will not be:

- Communicated informally
- Stored for more than a specified amount of time
- Transferred to organizations, states or countries that do not have adequate data protection policies

- Distributed to any party other than the ones agreed upon by the data's owner (exempting legitimate requests from law enforcement authorities)

In addition to ways of handling the data the company has direct obligations towards people to whom the data belongs. Specifically we must:

- Let people know which of their data is collected
- Inform people about how we'll process their data
- Inform people about who has access to their information
- Have provisions in cases of lost, corrupted or compromised data
- Allow people to request that we modify, erase, reduce or correct data contained in our databases

To exercise data protection we're committed to:

- Restrict and monitor access to sensitive data
- Develop transparent data collection procedures
- Train employees in online privacy and security measures
- Build secure networks to protect online data from cyberattacks
- Establish clear procedures for reporting privacy breaches or data misuse
- Include contract clauses or communicate statements on how we handle data
- Establish data protection practices (document shredding, secure locks, data encryption, frequent backups, access authorization etc.)

Our data protection provisions will appear on our website.

All principles described in this policy must be strictly followed. A breach of data protection guidelines will invoke disciplinary and possibly legal action.

**SECTION: Security & Safety**  
**POLICY: Violence in the Workplace**  
**POLICY #: 8.15**

**Violence in the Workplace**

Lydia Patterson Institute upholds a strict policy to ensure the safety and well-being of its employees by providing work environments free from physical attack, threats, and menacing or harassing behaviors. Any individual found making threats, demonstrating threatening behavior, or engaging in violent acts on the premises will be promptly removed in accordance with safety protocols and will remain off the premises pending the outcome of a thorough investigation. Upon completion of the investigation, Lydia Patterson Institute will take immediate and appropriate action, which may include, but is not limited to, suspension and/or termination of any business relationship, reassignment of job duties, suspension, or termination of employment, and/or criminal prosecution as deemed necessary.

**SECTION: Security & Safety**  
**POLICY: Technology Security**  
**POLICY #: 8.16**

**Technology Security**

Employee use of technology is a privilege and must be consistent with LPI's mission and values, including the Statement of Faith. Employees shall report any violation of this policy to the technology coordinator, Principal or President/Head of School. Violation of this policy may result in disciplinary action up to and including termination.

- Employees have no expectation of privacy in their use of the school's technology including but not limited to its computers, electronic devices, software, network, internet access or other systems. LPI may monitor, review, record, or log employee use of the school's technology including but not limited to personal devices connected to the school's network or systems.
- All documents, data, files, folders, communications and other materials created using the school's technology are property of the school. LPI does not warrant the functioning of its technology and consequently encourages employees to backup important material. LPI has the right to monitor, review, edit, remove, disclose or delete any material stored, created, received, accessed or maintained on Lydia Patterson's computers, electronic devices, network or other systems without notice to the employee. This includes but is not limited to all emails, documents, files and data.
- Employees shall use their Lydia Patterson email address rather than personal email addresses to conduct school business including but not limited to communications with students and families. Employees may not use their school email address for any inappropriate, offensive or illegal activity.
- All employee communications sent to students/parents should originate through PRAXI. Emails may be made using the school email, cc'ing a supervisor is highly recommended.
- Internet use is generally limited to scholarly research and other educational purposes. Employees may not access or exchange unlawful or inappropriate materials including but not limited to sexually explicit material, threatening, harassing or hateful materials and games. If an inappropriate website is mistakenly or accidentally accessed, it should immediately be reported to Principal or President/Head of School.
- LPI may block certain internet content including but not limited to social media and instant messaging services. Employees shall not "friend", "follow" or have other social networking relationships with current students or alumni under age 18. Employees should not actively peruse student's social media pages or accounts unless given permission to do so by the Principals or President/Head of School. In case an employee inadvertently becomes aware of a discipline or safety issue of a student through social media, they should contact their principal or supervisor, before responding to the student. Employees are strongly

encouraged to avoid social networking relationships with parents of current students. Employees are responsible for any material posted on their social media accounts.

- School-issued computers and electronic devices are owned by Lydia Patterson Institute. Employees may only install software, applications, upgrades or games that have first been approved by the Principal or President/Head of School and are owned by Lydia Patterson Institute. Changes to operating systems must also first be approved by Principal or President/Head of School. Employees should return the computer to the Support Services Manager whenever repair, service or cleaning is needed. Employees should also ensure that all computers and electronic devices have current antivirus software, security patches, and application updates.
- Employees should safeguard school computers and electronic devices to prevent damage or theft. If a School owned computer or electronic device is lost or stolen, the employee must immediately report it to the Support Services Manager.
- Security is the responsibility of all technology users at Lydia Patterson. Passwords must be kept confidential and not shared with others. Employees are responsible for use of their accounts, including use by other people. Employees should never allow students or others to use their accounts. Compromised passwords should be immediately changed and reported to Principal or President/Head of School. Employees must lock their screens or logout when their computers and electronic devices are not in use. Unauthorized access of any of the school's computers, electronic devices, software, network, internet access or other systems is prohibited.
- Employees may not use the school's technology for personal business ventures, mass e-mailing (SPAM), or storage of personal materials.
- Copyright laws must not be violated. Before using copyrighted materials, employees must receive permission for its use from the author and be sure to use proper citation.

**SECTION: Security & Safety**  
**POLICY: Bloodborne Pathogens**  
**POLICY #: 8.17**

**Bloodborne Pathogens Policy**

Lydia Patterson Institute is committed to providing a safe environment for all employees and visitors while complying with all applicable State and Federal regulations. This Exposure Control Plan has been developed to minimize and prevent the exposure of our employees to disease-causing microorganisms transmitted through human blood, in accordance with the Bloodborne Pathogens Standard set forth by the Occupational Safety and Health Administration (OSHA) Standard 29 CFR 1910.1030. Our institute has written and will implement this exposure control plan for all employees.

**Safety and Security of Our Premises**

At Lydia Patterson Institute, the safety and security of our premises and personnel are of utmost importance. We have implemented a comprehensive security system, a testament to our commitment to your safety. This system is designed to protect against fire hazards, unauthorized access, and theft. All employees will receive thorough training and detailed information about the security system as needed, ensuring that you are equipped with the knowledge to keep yourself and our institute safe.

It is imperative for all employees to fully understand and support management in upholding the integrity of the security system. Any attempt to compromise the system's effectiveness, disregard established security procedures, or divulge security system details to unauthorized individuals will result in immediate termination of employment.

**SECTION: Security & Safety**  
**POLICY: Health Safety Training**  
**POLICY #: 8.18**

**Health Safety Training**

Employees involved in physical activities for students should ensure that they maintain and submit proof of current certification or training in first aid, CPR, AED use, concussion, and extracurricular athletic activity safety to the administration office.

Certification or documentation of training should be issued by reputable organizations such as the American Red Cross, the American Heart Association, the University Interscholastic League, or an equivalent organization. Employees who are required to meet this standard must submit their certification or documentation to the administration office.

**SECTION: Security & Safety**  
**POLICY: Partnership Agreements**  
**POLICY #: 8.19**

**Partnership Agreements**

Lydia Patterson Institute (LPI) is committed to ensuring that every opportunity provided to our students—whether on or off campus—upholds the highest standards of safety, respect, Christian values, and care. As a faith-based institution, we believe that all student experiences must reflect not only our academic and ethical commitments but also our spiritual mission to nurture students in their growth as disciples and leaders of faith.

This policy establishes the framework for formal agreements with external partners when students participate in their programs or events. It underscores our responsibility to safeguard student well-being, honor our Christian responsibility to serve with integrity, maintain the confidence of parents and guardians, and give special consideration to the needs of students whose immigration status requires careful and compassionate handling.

This policy applies to all LPI partnerships with external organizations, including community groups, churches, faith-based organizations, nonprofits, businesses, universities, and government agencies, where LPI students are invited or expected to participate in activities, programs, or events hosted off school grounds.

**1. Written Agreements**

- All partnerships involving student participation must be formalized in writing. Agreements must clearly state:
  - The purpose and objectives of the partnership.
  - Roles, responsibilities, and expectations of both LPI and the partner.
  - Provisions for safety, supervision, and liability coverage.
- No partnership will be approved without proper documentation signed by authorized representatives of both parties.

**2. Safeguarding Student Well-Being**

- The physical, emotional, and spiritual safety of students is non-negotiable.
- Partner organizations must demonstrate established policies and practices that protect minors and young adults.
- Adequate adult supervision must be guaranteed at all times, with ratios that prioritize student safety and support.
- If transportation is involved, vehicles and drivers must comply with all safety regulations, licensing, and insurance requirements.

**3. Parent/Guardian Trust and Communication**

- Parents and guardians must be fully informed about any event involving their child, including details on:
  - Date, time, and location of the event.
  - Purpose and activities involved.

- Transportation arrangements, if any.
  - Partner organizations and their role in hosting or facilitating the event.
  - Written parental/guardian consent is required before student participation.
  - Transparency and open communication will guide all interactions with families, as maintaining their trust is essential to our mission.
4. Immigration Status Considerations
- LPI recognizes that many of its students live with unique immigration circumstances. Protecting their safety, dignity, and legal standing is of utmost importance.
  - Students will never be required to disclose immigration status directly to any partner organization. All related documentation will be handled exclusively by LPI.
  - Partner organizations must commit to respecting these boundaries and ensuring that no student is placed in a situation that jeopardizes their immigration status or family security.
  - Events or activities that could create risk for students with sensitive immigration circumstances will not be approved.
5. Review and Approval
- All agreements must be reviewed and approved by the President/Head of School (or designee) in consultation with the Business Office.
  - Legal or Board review may be required for agreements involving sensitive student information, immigration considerations, or significant liability.
  - Approval is contingent upon the partner's compliance with all elements of this policy.
6. Enforcement and Accountability
- Any breach of agreement or failure to uphold the standards outlined in this policy will result in the suspension or termination of the partnership.
  - LPI reserves the right to withdraw students from an event at any time if their safety, dignity, or well-being is in question.
  - Student well-being and parent trust are the highest priorities; no opportunity or partnership will take precedence over these commitments.

#### Commitment to Students and Families

At Lydia Patterson Institute, we believe our students deserve opportunities that allow them to thrive, grow, and share their God-given gifts with the world. Every partnership we enter is grounded in the values of safety, trust, respect, and faith. As a Christian school, we are committed to ensuring that all experiences offered to our students reflect our mission of nurturing their academic, spiritual, and personal development.

Parents and guardians have entrusted us with their children, and we honor that trust not only through our dedication to their education and well-being, but also by upholding the Christian values of love, compassion, and stewardship. Every decision we make reflects our responsibility to protect students, strengthen their faith, and support their success as children of God and future leaders.

**SECTION: Security & Safety**  
**POLICY: Reduction in Force**  
**POLICY #: 8.20**

**Reductions in Force (RIF) Policy**

In the event that a reduction in force becomes necessary due to financial constraints, changes in enrollment, programmatic shifts, facility consolidation, or organizational restructuring, Lydia Patterson Institute will approach the process with transparency, fairness, and strategic planning.

Key factors considered will include:

- Economic necessity or budgetary shortfalls
- Operational efficiency and restructuring needs
- Redundancy or consolidation of roles or departments
- Long-term sustainability and alignment with institutional goals

Should a RIF be required, the President and relevant administrative leadership will work together to:

- Establish and document the business rationale for the reduction
- Reassess current roles and responsibilities
- Review job functions and staffing models
- Evaluate potential reassignment or restructuring opportunities
- Develop and implement a communication plan to affected employees
- Ensure compliance with legal and contractual obligations

Where appropriate, LPI may also consider providing:

- Retention incentives for critical roles
- Transition assistance or outplacement support
- Information regarding eligibility for unemployment benefits

All decisions related to reductions in force will be made in alignment with LPI's mission, institutional priorities, and commitment to treating employees with respect and professionalism.

**SECTION: Security & Safety**  
**POLICY: Approval & Signatory Authority**  
**POLICY #: 8.21**

**Approval & Signatory Authority**

This policy outlines the guidelines for approving and authorizing all financial commitments made by Lydia Patterson Institute. It defines the authority to conduct purchases and enter into contracts not covered by other policies. To ensure proper fiscal oversight of fund disbursement, only specifically designated personnel are authorized to initiate purchases, contract engagements, or in any way commit Lydia Patterson Institute resources. The President will periodically designate the staff member(s) with the authority to execute necessary contracts or other documents on behalf of the Institute. With the approval of the Finance Committee Chair, the President will execute contracts or other documents for cumulative financial obligations exceeding \$250,000.

## **Asbestos Management Policy**

Lydia Patterson Institute is committed to providing a safe and healthy environment for all students, employees, and visitors. In compliance with the Asbestos Hazard Emergency Response Act (AHERA), the Environmental Protection Agency (EPA), and the Occupational Safety and Health Administration (OSHA) regulations, the school has established an Asbestos Management Plan to identify, monitor, and address asbestos-containing materials (ACM) within our facilities.

### **1. Management Plan**

- The Asbestos Management Plan is maintained in the Administrative Office and is available for review during regular business hours.
- The plan outlines inspection reports, sampling results, response actions, reinspection schedules, and staff training documentation.

### **2. Inspections and Monitoring**

- Accredited inspectors conduct asbestos inspections every three years, with periodic surveillance every six months, as required by AHERA.
- If asbestos-containing material is present, it is carefully monitored to ensure it remains in good condition and does not pose a health hazard.
- Air monitoring will be conducted if asbestos work is performed, to ensure employee exposure remains below OSHA's permissible exposure limit (PEL) of 0.1 fiber per cubic centimeter of air as an 8-hour time-weighted average.

### **3. Response Actions**

- If damaged or deteriorating ACM is found, appropriate response actions—such as repair, encapsulation, enclosure, or removal—will be carried out by licensed asbestos abatement professionals.
- All asbestos work will be performed in compliance with OSHA regulations, including the use of protective equipment, engineering controls, and required air monitoring.
- No employee, student, or unauthorized individual may disturb, remove, or repair suspected ACM.

### **4. Training and Communication**

- Custodial and maintenance staff receive ongoing asbestos awareness training, including safe work practices and procedures for reporting concerns, as required by OSHA.
- Staff, parents, and guardians will be notified annually of the plan's availability and any major asbestos-related actions.

## **5. Responsibilities**

- The Facilities Manager is designated as the **Asbestos Program Coordinator** and is responsible for overseeing compliance with EPA and OSHA regulations, coordinating inspections, and ensuring proper documentation.
- Employees must report any suspected damage or deterioration of building materials immediately to the Facilities Manager or Administration.
- Records of inspections, training, air monitoring, and asbestos-related work will be maintained in accordance with EPA and OSHA requirements.

## **6. Safety Assurance**

- Asbestos-containing materials in good condition pose no immediate risk. Through careful monitoring, safe maintenance practices, compliance with OSHA exposure standards, and timely remediation, Lydia Patterson Institute ensures a safe environment for all students, staff, and visitors.

**Other**

**Maintenance**

Employees should report all needed maintenance requests using the electronic form.

**Safety**

Employees must promptly report all observed safety and health violations, potentially unsafe conditions, and any accidents resulting in injuries to their supervisors and/or the Director of Safety and Risk. Suggestions concerning safety and health matters are encouraged.

**School Equipment**

Use of School equipment is a privilege, not a right. Employees who treat equipment in a negligent manner or lose, damage or deface equipment will be subject to disciplinary action up to and including termination.

School issued electronic devices must be kept in approved cases and not placed in conventional book bags. Employees will be charged accordingly for loss or negligent damage to equipment (including electronics).

**Vehicles and Transporting Students**

Use of School vehicles must be scheduled in advance with the Support Services Manager. The vehicles must be returned to School inside and outside clean and all mileage and gas information must be input upon return of van. Only employees who have been approved by the Support Services Manager, may drive and/or transport students for LPI. Please refer to Driving LPI Vehicles and Transporting Students Policy.

**Theft**

Any employee guilty of theft of School property may be terminated immediately.

**End of Year Check Out**

Teachers are responsible for obtaining materials and any items owned by Lydia Patterson Institute from their students during student checkout and prior to the teacher leaving for summer break. All returning and non-returning employees will complete an employee checkout form before the summer break.

Classrooms should be left in a good, non-cluttered condition with all items in their proper place or disposed of. All empty boxes should be broken down and arrangements made for them, and any other trash, to be hauled away by janitor. Trash and unwanted items should not be left in the classroom, hallways, or the breakroom. All personal items should be removed from the refrigerators in the breakroom.

## **SECTION 9: FISCAL MANAGEMENT**

The fiscal year of our school begins on September 1st of each year, as determined by our board of trustees.

LPI has an internal control structure in place to provide reasonable assurance that the school's assets are safeguarded from unauthorized use or disposition. The attitude of a school's administration about the importance of internal controls is a key factor in the successful implementation of an internal control system. Development of policies and procedures that include internal control elements is critical. Willingness to immediately take corrective action when deficiencies are discovered is also important. LPI's internal control plan includes:

- Security measures to safeguard the school's assets from internal or external misuse (such as video monitoring, limiting access, security codes and computer passwords)
- Determination of duties
- Hardware and software controls
- Internal audit and review functions
- External audits

**SECTION: Fiscal Management**  
**POLICY: Accounting**  
**POLICY #: 9.01**

## **Accounting Policy**

The purpose of this Accounting Policy is to establish clear and consistent guidelines for the financial management and reporting of Lydia Patterson Institute (LPI). This policy ensures fiscal responsibility, transparency, internal controls, and compliance with applicable accounting standards, laws, and donor expectations.

### **1. Basis of Accounting**

LPI uses the accrual basis of accounting in accordance with Generally Accepted Accounting Principles (GAAP). Revenues are recorded when earned, and expenses are recorded when incurred, regardless of when cash is received or paid.

### **2. Fiscal Year**

The fiscal year of LPI runs from September 1 to August 31 of each year. All financial reporting, budgeting, and audits are conducted based on this fiscal calendar.

### **3. Accounting Responsibilities**

- The President is ultimately responsible for the fiscal oversight of the school.
- The Business Manager oversees day-to-day financial operations, reporting directly to the President.
- The Accountant is responsible for accurate recordkeeping, reconciliation, and compliance with internal controls.

All staff involved in financial transactions are expected to comply with this policy and related procedures.

### **4. Chart of Accounts**

LPI maintains a standardized and detailed Chart of Accounts to ensure accurate tracking of income and expenses. Accounts are categorized by department, program, and funding source to support detailed reporting and financial analysis.

### **5. Financial Reporting**

- Monthly Financial Reports must be prepared by the Business Office, reviewed by the President, and submitted to the Finance Committee and Board of Trustees. Reports must include:
  - ✓ Income Statement
  - ✓ Balance Sheet
  - ✓ Budget vs. Actual Analysis
- Variances must be explained, and corrective actions documented when necessary.

## **6. Budgeting**

- A comprehensive annual budget is prepared by the President and approved by the Board of Trustees prior to the start of the fiscal year.
- Budget development involves input from department heads, based on program needs and strategic goals.
- Budget revisions may be made mid-year with approval from the President and Finance Committee.

## **7. Internal Controls**

To maintain the integrity of financial operations, LPI enforces strong internal controls, including:

- Separation of duties for authorization, recordkeeping, and custody of assets
- Two signatures required on checks above a designated threshold
- Restricted access to accounting software and financial records
- Regular reconciliation of bank and credit card accounts
- Periodic internal reviews and annual audits by an independent CPA firm

## **8. Procurement & Expenditures**

- All purchases must follow the Procurement Policy and require appropriate documentation, including a requisition form, purchase order, and invoice.
- All expenditures must align with the approved budget unless explicitly authorized in writing by the President.

## **9. Grants, Donations & Restricted Funds**

- All grant and donor funds are recorded and tracked in accordance with donor restrictions.
- Restricted funds may only be used for designated purposes and must be reported separately in financial statements.
- Acknowledgment letters and records are maintained for all donations.

## **10. Payroll**

- Payroll is processed on a regular semimonthly schedule by the Business Office.
- All payroll records, timesheets, and personnel files are maintained securely.
- Employees must clock in/out using the approved timekeeping system.

## **11. Financial Audit**

LPI undergoes an annual independent financial audit conducted by a certified public accounting firm. The audit report is presented to the President, Finance Committee, and Board of Trustees.

## **12. Record Retention**

All financial records are maintained according to LPI's Record Retention Policy, in compliance with federal and state requirements. Records are stored securely, with digital backups where applicable.

### **13. Compliance**

This policy aligns with applicable standards including:

- Generally Accepted Accounting Principles (GAAP)
- IRS regulations for 501(c)(3) nonprofits
- State of Texas nonprofit financial reporting requirements
- UMC-related financial accountability standards (if applicable)

### **14. Policy Review**

This Accounting Policy will be reviewed annually by the President and Business Office in collaboration with the Finance Committee. Updates will be approved by the Board of Trustees.

**SECTION: Fiscal Management**  
**POLICY: Financial Policies**  
**POLICY #: 9.02**

**Financial Policies**

The President/Head of School, working with the Board of Trustees manages Lydia Patterson's budget. Certain designated employees will have authority over portions of the budget. In order to make an acquisition or incur an expense, employees will follow procedures set by their supervisor and Lydia Patterson Institute's financial policies.

**Money in the Classroom**

There should be no cash or checks collected by employees for any purpose. All monies are processed through the Business Office.

**Accounts Payable/Receivable**

Lydia Patterson Institute and its Board of Trustees shall endeavor, in accordance with their fiduciary duty and applicable law, to honor any legal restrictions on federal or state funds and donor restrictions on funds, and to ensure that the use and obligation of all funds, for the purchase of goods and services that have a direct benefit to students, are in the best interest of students and facilitate the implementation of LPI's programs.

Business office will be responsible for account payable. To ensure that Lydia Patterson Institute remains in good standing with its vendors and that its credit or financial ratings are not adversely affected, the Business Manager shall issue payments to vendors for invoiced amounts pursuant to this policy and to the agreed-upon terms and conditions noted on the purchase order, executed contract, or invoice.

The Business Manager shall only disburse funds to a vendor if the following conditions have been met. The invoice:

- Fully identifies the vendor, including the vendor's authorized representative, and said identifying information conforms to that on the purchase order issued by LPI to the vendor and/or the executed contract;
- Includes an invoice number and date;
- Is addressed to LPI, including the proper mailing address for accounts payable and the address to which goods and/or services were delivered;
- References the purchase order number issued; and
- Delineates in sufficient detail the goods and/or services provided to LPI, including the quantity and the date that the goods were delivered or the services were rendered.
- As applicable, the vendor has filed:
  - Form W-9
  - Non-Conflict of Interest
- LPI personnel have confirmed, in writing, that the goods and/or services

- delineated on the vendor's invoice have in fact been received and there is no cause for dispute;
- LPI personnel have confirmed, in writing, that the terms and conditions of a properly issued purchase order and/or the executed contract have been satisfied, including, but not limited to:
    - The conformance of the goods and/or services to the agreed-upon specifications;
    - The quantity of goods and/or services ordered; and
    - The agreed-upon price per unit;
    - The vendor did not levy a sales or other tax from which LPI is exempt and did not charge a finance fee or other amount to which LPI did not previously agree on its invoice; and
    - The vendor has satisfactorily addressed any concerns or issues identified by LPI personnel regarding the goods and/or services received and/or the invoiced amount(s).

If the requirements above are met, the Business Manager may issue payment to the vendor pursuant to the terms set forth in the invoice or as previously agreed-upon in the purchase order or executed contract.

The Business Manager shall not issue payment to a vendor based upon a statement listing outstanding invoices. The Business Manager must review any such statements and satisfactorily address any outstanding amounts due.

The Business Manager should issue payment to the vendor for any invoiced amount(s) that LPI is not disputing, provided that the resulting payment is not counter to the benefit of LPI's students and the school.

### **Defective Invoice**

The Business Manager shall return any invoice that fails to conform to the requirements of this policy. In doing so, the Business Manager shall issue a letter to the vendor along with the defective invoice describing the defect(s) and requesting the issuance of a new invoice and requiring that a revised due date for the invoiced amount(s) be provided.

The Business Manager may only issue payment to a vendor for an invoice meeting the requirements of this policy after it has been reviewed and approved.

### **Prepaid Items**

The Business Manager may prepay an amount to a vendor but must account for such prepaid items in accordance with generally accepted accounting principles, state and federal fiscal requirements, and Board policy, including the Board Fixed Asset Policy.

### **Communication with Vendors**

LPI personnel shall document all communications with vendors regarding their invoice(s) for any goods and/or services, including concerns relating to price, quality, quantity, type, and other agreed-upon terms or conditions.

### **Disbursement from Proper Fund Source**

The Business Manager shall disburse funds from a fund source to the vendor for an invoiced amount(s) if the goods and/or services received were:

- For an allowable activity, pursuant to applicable law and rule;
- For an allowable use of funds, in accordance with applicable law and rule; and
- In compliance with other applicable law, rule and policy.

### **Disbursement to Vendors**

The Business Manager shall only issue payment to a vendor's mailing address or directly into the vendor's bank account.

The oldest bills will be paid first. When a bill goes overdue, the creditor receives less than payment-in-full, or when the creditor receives less payment than was arranged previously, the Business Manager will notify such a creditor immediately.

All undesignated money received by LPI, whether tuition or gifts, will be applied to the oldest bills first. If, as a result of implementing this policy, it becomes clear to the President that the school will be unable to make payroll, then she will notify the Chairman of the Board in the event that payday will not be made in full, for whatever reason. The responsibility for the generation of the necessary gifts for staff will become the Board's responsibility. The President will retain her responsibility for accounts receivable to the school.

If payroll is not completely met, then the Board or Board representative will meet with the staff to work with them concerning our failure to meet our obligations to them.

### **Overdue Bills**

The oldest bills will be paid first. When a bill goes overdue, the creditor receives less than payment-in-full, or when the creditor receives less payment than was arranged previously, the Business Manager will notify such a creditor immediately.

All undesignated money received by Lydia Patterson Institute, whether tuition or gifts, will be applied to the oldest bills first. If, as a result of implementing this policy, it becomes clear to the President that the school will be unable to make payroll, then she will notify the Chairman of the Board in the event that payday will not be made in full, for whatever reason. The responsibility for the generation of the necessary gifts for staff will become the Board's responsibility. The President will retain her responsibility for accounts receivable to the school.

### **Accounts Receivables**

Accounts Receivable within LPI will occasionally bill for services performed to entities outside the school. Accounts Receivable represents the money that will be received for those services. The Business Office is ultimately responsible for accurately reporting all received and expected revenue.

The purpose for the Accounts Receivable policy is to provide accurate and timely information regarding money owed to LPI and revenue to be accounted for per accounting standards. This policy will cover all departments within LPI and will provide a uniform Accounts Receivable invoice generated by the school accounting program and allow for accurate reporting of received revenue.

School student receivables are exempt from this policy. An invoice will need to be generated for any services performed that will be billed to any entity outside LPI.

An invoice will need to be generated for any Accounts Payable overpayment. Most vendors will not refund overpayments until an invoice or letter has been sent. This will help track total payments, including refunds, of all vendors.

Invoices will not necessarily be sent to each payee, but an accurate accounting of money owed, which can be tracked through the year, is important for reporting purposes.

Federal, state, and local grants will be set up on Accounts Receivable each month as claims are done. This will help reconcile money received by check, on the school allotment memo each month, and with accruals at the end of the fiscal year.

Business Manager is in charge of generating regular invoices will input information directly into the school's accounting system.

All payments for invoices shall be received directly by the Business Office and deposited into the school bank account.

### **Requisitions and Purchasing Policies and Procedures**

The purpose of the Requisition and a Purchase Order is to give staff members a method to ask for goods or services. All requisitions must be originated prior to obligating Lydia Patterson Institute for an expense. Failure to originate a requisition is against Lydia Patterson Institute purchasing guidelines and the staff member can be held personally liable for the purchase.

A major management process supporting financial accountability in a school is the purchasing function. Purchasing has several links to overall accountability initiatives.

The competitive nature of purchasing and the expenditure of funds require that ethical standards be incorporated into the foundation of all purchasing functions. Business Office personnel face the difficult task of developing good vendor relations and encouraging vendor competition while avoiding even the appearance of favoritism or other ethical misconduct.

Steps to purchase items:

1. Determine the need: An employee makes a request for a purchase to the Business Office. This request is called a requisition.

2. The Requisition form includes details about the goods or services that need to be purchased, vendor(s) information and the cost.
  - Requisitions are divided according to the type of action required on the purchase. The following are the recognized types of requisitions:
    - Normal
    - Urgent – for all purchasing transactions incurred because of an emergency condition threatening the safety or welfare of the school, students or staff. An emergency purchase requires President approval.
3. The form is submitted to the supervisor for approval and then the Business Office.
4. The Business Office will generate a purchase order if one is necessary. Not all requisitions require the creation of a Purchase Order.
5. If a Purchase Order is necessary, once the requisition form is approved, a purchase order is created. This document authorizes the supplier to provide the requested goods or services and outlines the terms and conditions of the purchase.

#### ***PURCHASE ORDER FLOW CHART***

- Fill out Requisition Form
  - Obtain quote(s) from vendor(s)
  - Submit to department head
  - Approval by department head
  - Department head submits Requisition to Business Office
- Requisition Form will be entered in Requisition Log by Business Office
- Approval by Business Manager and President (if necessary)
- Items will be ordered if no Purchase Order is required
  - If a Purchase Order is required one will be created, approved and issued
  - Submit purchase order to vendor
- Receive merchandise by vendor
- Invoice to Business Office - Accounts Payable
- Accounts Payable issues check to vendor

#### **Request for Quotes**

The employee must get quotes as follows:

\$0.01 - \$2,499 – Single written quote (can be obtained online)

\$2,500 – \$24,999 – Three written quotes and competitive procurement requirements and procedures

- 3 Quotes from different companies with detailed description of the service needed, warranties and costs.
- Once a vendor has been selected, the purchase order process needs to be approved by the President of LPI
- Complete contract between LPI and vendor with all the agreed terms and conditions
- Once work has been completed, the department head and the Facilities/Maintenance Manager will inspect and approve the finish product
- Documents of the complete work will be turn in to the business office for

payment.

All purchases \$25,000 need to have board approval and follow the Competitive procurement requirements. All school contracts shall be made by the method that provides the best value for the school:

- Competitive bidding
- An inter local contract
- Construction manager-at risk method
- A job order contract

### **Vendor selection and relations**

In determining contract awards to vendors, the school shall consider:

- The purchase price
- The reputation of the vendor and the vendor's goods and services
- The quality of the vendor's goods or services
- The extent to which the goods or services meet the school's needs
- The vendor's past relationship with the school
- The impact on the ability of the district to comply with laws and rules relating to historically underutilized businesses
- The total long-term cost to the school to acquire the vendor's goods or services

Exceptions for non-bid vendor(s) must be approved by Business Office.

School officials and employees cannot accept anything of value from a vendor, such as personal gifts or gratuities, which may be construed to have been given to influence the purchasing process.

### ***Modification or cancelation:***

Whenever it becomes necessary to modify or cancel items listed on a purchase order, the following procedures will apply:

- A change to a purchase order can only be approved by the Business Manager.
- Requests to modify the purchase order will be submitted in writing and signed by the department head who originated the purchase request. These requests will list the vendor, purchase order number, nature of the change.
- Upon receipt of the request to modify the purchase order, the Business Office will issue the modification, if feasible.
- The physical return of items on the purchase order cancelled through modification but already received will be the responsibility of the requesting department.
- Requesters must be aware of the possibility of restocking fees or other penalties charged by vendors. Restocking fees are the responsibility of the requesting department and will be charged to the purchase order.
- Items changed without a modification to the purchase order will become the responsibility of the person issuing the unauthorized change.

Lydia Patterson Institute is not liable for purchases or services received without a valid signed purchase order. Lydia Patterson Institute will not reimburse employees or assume responsibility for purchases made without authorization from the Business Office. Employees are not permitted to purchase supplies or equipment for personal use through the school.

### **Receiving Deliveries**

Supplies and/or materials ordered with a purchase order will be shipped to Lydia Patterson Institute, Business Office, located at 517 S. Florence St., El Paso, TX 79901.

Business Office staff are designated to sign for and process deliveries. Deliveries will have to be signed for and dated at the time they are delivered. Verify the number of containers (boxes) delivered against what is signed for. If the number does not coincide with what is physically there, note it on the delivery document you are signing, e.g.: "Only Y boxes were received." At the same time the number of boxes is verified, inspect the condition of the boxes. If one or more are damaged, the damage may have been transferred to the contents. Rather than reject the shipment, write on the document "Possible hidden damage."

It is important to only mark items as "received" when merchandise has been received. To do otherwise, would potentially cause payment of merchandise that was not received.

A packing list is a document that is sent by the vendor. It is usually packed inside or attached to the merchandise received. The packing list will generally describe the merchandise being sent. Upon receipt of delivery, the Business Office will verify the count, and the items ordered against the packing list and purchase order. If receive damaged items, incomplete quantity of items, received items not on order, or incorrectly priced items, the Business Office will notify the vendor.

The Uniform Commercial Code stipulates ten (10) calendar days in which to identify discrepancies. Once this period passes, your rights to address discrepancies are severely impaired. Business office will check (receive) incoming shipments following these steps:

- Check requisition/PO log and determine if the purchase is still open or if this is a duplicate shipment. If a duplicate, reject the shipment without further action, notifying the Purchasing Department regarding this action.
- Check contents against the order. Verify actual quantities; don't assume they are correct.
- Check the quantities counted and indicated on the receiving copy of the order against the packing slip provided by the company.
- Receive only items that were shipped. Send the packing slip to the Business Manager - Accounts Payable, to process payment. NOTE Requisition/PO number on packing list.

The Business Office - Accounts Payable otherwise, checks will be issued from purchase order when an invoice has been received AND merchandise and/or services have been received. Send all original packing slips, receipts, and/or invoices to Business Office - accounts payable. If no packing slip is available, please sign a copy of requisition/purchase order and send to accounts payable to confirm receipt of your order.

**After-the-Fact Reimbursement**

To receive reimbursement for a purchase, employees must prepare an After-the-Fact Requisition Form and obtain the signatures necessary for approval. Any supporting documents (i.e., receipts) should be attached to the form. A reason why a purchase without pre-approval was made must be attached.

Once the form has been approved it should be returned to the Business Office before 4:00 p.m. on Mondays as checks are issued on Fridays twice a month.

**SECTION: Fiscal Management**  
**POLICY: Check Request**  
**POLICY #: 9.03**

**Check Request**

It is very important that staff members identify the timetable required when a check will need to be processed. Business Office' deadline for check requests of less than \$100 would be issued every Friday. For check requests greater than \$100, the Business Office will make every effort to adhere to the Accounts Payable schedule, but occasionally there is a need to adjust the dates and times to accommodate extraordinary circumstances. With the large number of purchase requests received each week, employees should be flexible and understand that variations to the schedule must sometimes be made.

The Business Office works diligently to process all requests. All requests must be completed and correct and in the office by deadline. Any incomplete items will delay payment.

For reimbursement that were not approved, they require to be accompanied by backup documentation and/or receipts, along with an explanation as to why policy was not followed by creating a requisition. Please make notes on your paperwork for any check requests or purchase orders that need to be held for any reason. Please highlight these notes or you may email the Business Manager for further explanation.

**SECTION: Fiscal Management**  
**POLICY: School Credit Card Use**  
**POLICY #: 9.04**

**School Credit Card Use**

Lydia Patterson Institute maintains a credit card. Credit Card is used primarily for travel expenses. However, occasionally an employee may submit a requisition for the use of credit card for materials. The Business Manager must approve the purchase order before the card is issued. When using school credit card, employees are expected to use caution and safeguard the card as they would a personal credit card. Employees must return the card as soon as the purchase/trip is complete, with original receipts. Not only does the IRS require original receipts, but they are vital when paying credit card invoices. Lost and loose receipts with no identifying information are impossible to track and cause unnecessary delays in payment.

Not following these procedures may result in employees losing the privilege to check out and use credit cards.

**SECTION: Fiscal Management**  
**POLICY: Travel Requests**  
**POLICY #: 9.05**

**Travel Requests**

Travel expenses are the ordinary and necessary expenses of traveling away from home for work. All employee travel must be pre-approved by department heads, regardless of whether or not an advance is desired. An employee requesting travel must fill out a Travel Request Form and submit it to the department head. Department head will submit to Business Office for processing.

***Pre-Trip Procedures***

Since planning is crucial to any trip and time is of the essence, please complete a Travel Request Form at least 21 calendar days prior to travel and receive necessary approvals.

Registration: A registration form must be attached to the travel form. It is the responsibility of the employee to make sure they are registered on time.

Lodging: School are exempt from Texas state sales tax on lodging but are not exempt from city taxes or other taxes imposed for lodging.

Reservations – The employee is responsible for making reservations. The reservation confirmation form must be included on the travel request form. Request the education rate for education entities when making reservations.

**Mileage**

Travelers are required to calculate mileage by using an electronic mapping source ([www.Mapquest.com](http://www.Mapquest.com)). The traveler must print out the driving directions provided by the site and attach them to the travel request form.

As per Texas State Comptroller's website. (Effective January 1, 2024) Mileage reimbursement rate is 67 cents per mile.

**Meals**

The following maximum meal and lodging reimbursement rates apply to in-state and out-of-state travel.

Travel allowances, in which the per diem is paid to the employee regardless of the amount actually expended, are not allowable.

Meals will be reimbursed for actual expenses up to the local policy per diem rate allowed.

Per Diem

| <b>Breakfast</b> | <b>Lunch</b> | <b>Dinner</b> | <b>Total</b> |
|------------------|--------------|---------------|--------------|
| \$13             | \$20         | \$20          | \$53         |

As per Texas State Comptroller's website: [www.gsa.gov/portal/content/104877](http://www.gsa.gov/portal/content/104877)  
Hotel and county taxes are not included in the maximum amount.

### **Transportation Fares**

Transportation fares are not advanced prior to the trip. They will be reimbursed with original receipt only if it is for the official business of the meeting, conference or workshop.

### **Travel Documentation**

Travel costs must be properly documented to be reimbursable. The employee must document travel costs with a Travel Request Form. Auditable documentation must include the following at a minimum:

- Name of the individual requesting travel
- Destination and purpose of the trip
- Dates of travel
- Actual amount of lodging per day, with a receipt attached
- Amount for meals per day
- Amount for transportation, such as uber, taxis and shuttles
- Actual amount expended on a rental car, with a receipt attached and justification for rental car;
- Amount for gasoline for rental car (mileage is not reimbursed for a rental car— only the cost of gasoline is reimbursed)
- Actual amount expended on incidentals, such as hotel taxes, copying of materials, and other costs associated with the travel

The following travel expenses are not allowable for employees with the exception of the President:

- First-class air fare
- Tips or gratuities of any kind
- Alcoholic beverages
- Entertainment & recreation
- Any expense for other persons
- Travel costs not supported by proper documentation are not allowable to be charged to LPI and are subject to disallowance by auditors.

**SECTION: Fiscal Management**  
**POLICY: Vehicle Rental**  
**POLICY #: 9.06**

**Vehicle Rental**

Vehicle rentals should be made in the name of the school using a school credit card. Verify that the rental company has an account set up with Lydia Patterson Institute prior to renting the vehicle. (LPI's auto policy will extend for liability coverage.) The driver must sign the rental contract on behalf of LPI.

All drivers transporting students must be properly vetted and approved by administration. This includes a valid driver's license, a clean driving record, and completion of any required background checks or training. No employee or volunteer may transport students without prior written authorization from school leadership.

**SECTION: Fiscal Management**  
**POLICY: Travel Expense Reimbursement**  
**POLICY #: 9.07**

**Travel Expense Reimbursement Policy**

This policy outlines the procedures and expectations for the approval and reimbursement of work-related travel expenses incurred by employees of Lydia Patterson Institute (LPI). The goal is to ensure that all travel is pre-approved, cost-effective, and properly documented in alignment with the school's budget and financial controls.

**1. Pre-Approval Requirement**

- All travel must be approved in writing by the employee's direct supervisor and, where applicable, the President or Business Manager prior to any costs being incurred.
- Unauthorized travel or expenses incurred without pre-approval may not be eligible for reimbursement.

**2. Reimbursable Travel Expenses**

Approved expenses that may be reimbursed include, but are not limited to:

- **Mileage** for personal vehicle use, calculated at the IRS-approved rate or the rate set by the LPI Board of Trustees
- **Lodging** (within reasonable limits and with itemized receipts)
- **Airfare** (economy class unless otherwise approved)
- **Ground transportation** (e.g., taxi, rideshare, rental cars, parking fees)
- **Meals** (when travel requires an overnight stay; alcohol is not reimbursable)
- **Conference fees or registration** (if pre-approved)

*Note:* All expenses must be reasonable, necessary, and directly related to school business.

**3. Non-Reimbursable Expenses**

The following are examples of non-reimbursable expenses:

- Personal entertainment (e.g., movies, in-room service)
- Alcoholic beverages
- Personal purchases or gifts
- Travel upgrades (e.g., first-class tickets, luxury hotel suites)
- Expenses for family members or guests
- Fines, penalties, or traffic tickets
- Late check-out or cancellation fees unless justified and approved

**4. Documentation & Submission Requirements**

- A completed Travel Reimbursement Form must be submitted within 3 business days of returning from travel.
- Original, itemized receipts must be provided for all expenses other than mileage.
- For mileage reimbursement, employees must submit a mileage log including:
  - Date of travel
  - Destination and purpose

- Total miles driven
- Receipts must clearly show the date, vendor, itemized amount, and method of payment.
- All documentation must be submitted to the Business Office for review and processing.

#### **5. Reimbursement Process**

- Reimbursements will be processed within 10 business days of receiving complete and accurate documentation.
- Reimbursement will be issued via check in accordance with LPI's accounting schedule.

#### **6. Responsibility and Oversight**

- Employees are expected to use good judgment and stewardship of school funds when incurring travel expenses.
- Supervisors and the Business Office are responsible for reviewing requests and ensuring compliance with policy.
- Repeated submission of incomplete or non-compliant reimbursement requests may result in delayed processing or denial of reimbursement.

#### **7. Exceptions**

Any exceptions to this policy must be approved in writing by the President or Board of Trustees, depending on the amount and nature of the expense.

This policy ensures transparency, fairness, and accountability in how LPI handles employee travel expenses. All employees are expected to comply fully with these procedures.

#### **Reimbursement for Travel Not Taken**

If an employee is not able to attend scheduled travel, the employee is responsible for canceling reservations prior to the time an actual expense is incurred. The school will not reimburse employees for out of pocket travel expenses, unless the travel is cancelled at the direction of the President due to the needs of the school. In such an instance, the school will only reimburse charges incurred and previously paid by the employee. For example, the school will reimburse lodging expenses if the President made the decision for an employee not to attend; and it was too late to cancel a lodging reservation without incurring an expense. An employee unable to attend travel for personal reasons is personally responsible for any expenses previously paid by the school.

**SECTION: Fiscal Management**  
**POLICY: Student Travel**  
**POLICY #: 9.08**

**Student Travel Policy**

This policy governs all student travel conducted under the auspices of Lydia Patterson Institute. It ensures that all student trips are safe, properly supervised, well-documented, and financially accountable.

**1. Preapproval Requirements**

- All student travel must be preapproved by the Principal, regardless of whether advance funding is requested.
- An LPI Travel Request Form must be completed and submitted to the Principal for all planned student travel, including out-of-town events, academic competitions, athletic activities, service trips, and ministry-related travel.
- Once reviewed and approved by the Principal, the request and accompanying documentation must be submitted to the Business Office at least three (3) weeks prior to the travel date.
- Required documentation includes:
  - Parent/guardian permission slips
  - Medical release forms
  - Emergency contact list
  - Trip itinerary and purpose
  - Chaperone list and assignments
  - Proof of valid student accident or health insurance on file

**2. Student Insurance Requirement**

- All students participating in school-sponsored travel must have valid accident or health insurance coverage on file with the school prior to departure.
- A copy of the insurance card or documentation must be submitted with the travel packet and verified by the Principal's Office.
- If a student does not have insurance, the family must purchase a temporary travel policy or school-provided coverage if available.
- No student will be allowed to participate in off-campus travel without verified insurance coverage.

**3. Chaperone Requirements**

- A minimum chaperone-to-student ratio of 1:8 is required for all student travel.
- At least one LPI employee must serve as the lead chaperone and be responsible for oversight, conduct, and communication during the trip.
- If female students are participating in the trip, at least one female chaperone must be present and available at all times. Similarly, when male and female students are traveling together, chaperones of both genders must be included to ensure appropriate supervision, lodging arrangements, and support.

- All chaperones must be approved by administration, cleared through background checks, and listed on the official travel documentation.

#### **4. Transportation Guidelines**

- No private vehicles may be used to transport students under any circumstance.
- Only LPI-approved transportation methods may be used, such as:
  - School-owned vans or buses
  - Chartered vehicles from licensed and insured transportation companies

#### **Use of School Vehicles:**

- Smoking is strictly prohibited in all school vehicles
- Personal errands during student travel are not permitted
- Drivers must adhere to all traffic laws and represent LPI with professionalism
- Any traffic citations incurred are the personal responsibility of the driver
- Seat belts must be worn at all times

#### **5. Expense Guidelines and Reimbursement**

- Student travel expenses (lodging, meals, registration, fuel, etc.) will be reimbursed based on the same guidelines as employee travel, unless otherwise approved.
- All receipts must be submitted to the Business Office within three (3) business days of the trip's conclusion.
- If receipts are not submitted or expenses cannot be verified and reconciled, the employee traveler may be held financially responsible for any school funds previously issued.

#### **6. Conduct and Representation**

- All students and staff are expected to uphold the values and standards of Lydia Patterson Institute at all times during travel.
- Chaperones must maintain active supervision, enforce behavioral expectations, and report any incidents to school administration upon return.
- Any violation of school policy, misconduct, or safety issue must be documented and addressed immediately.

#### **7. Emergencies and Communication**

- The lead chaperone must carry emergency contact information for all students at all times.
- The trip itinerary and emergency protocol must be filed with the Principal prior to departure.
- Any significant incident during travel must be reported to the administration immediately.

This policy exists to ensure the safety, integrity, and accountability of all student travel conducted in the name of Lydia Patterson Institute. Failure to comply with these procedures may result in disciplinary action and loss of travel privileges.

**SECTION: Fiscal Management**  
**POLICY: Funds/Cash Management**  
**POLICY #: 9.09**

**Funds/Cash Management**

This manual provides a set of standardized accounting procedures for the administration of Student Activity and School Activity accounts. Department heads and other employees involved in the handling of these funds should become knowledgeable of the instructions prescribed in this manual.

The principal, department heads, teachers, and clerical staff are placed in a position of trust by parents and students when funds are placed in their care. Adequate measures to control these funds will assure parents and students that the funds are handled properly. Student Activity and School Activity Accounts may not be used to circumvent the controls established. Purchases must comply with the school's purchasing procedures and relevant statutes.

**Types of Activity Funds**

There are two types of activity funds that are common for schools. The first is a School Activity account which is used for items such as school pictures, yearbooks, etc. These funds shall be used to promote the general welfare of the school and the educational development and morale of all students.

The second type of activity fund is the Student Activity Accounts which are property of student groups, i.e. student council, art club, etc. The school is required to provide stewardship by properly accounting for these funds. Decisions on the use of student funds are the concern of the specific student groups to whom the funds belong, as long as the decisions regarding the use of the funds do not conflict with Board policy and/or legal regulations or restrictions.

To secure the deposit of public funds, all activity funds must be deposited with the school's banking institution.

**School Activity Accounts**

School Activity accounts contain funds raised at a school which are managed by the Business Office. These funds are accounted for as School Funds. School Activity accounts must be spent to promote the general welfare of the school and the educational development of students. Schools may use these funds to supplement their budgeted school funds. School funds should not be spent to benefit any individual at personal level.

**Student Activity Funds**

Student Activity Funds consist of money that is received and held by the school as trustee. Individual student groups raise these funds and their disbursement is controlled by that group as long as the decisions regarding their use of funds do not conflict with Board policy and/or legal regulations or restrictions. Student activity funds are accounted for by the school. The basic purpose for the collection or raising and expending of activity funds must be for the direct benefit of the students or for the general benefit of the school. Within this scope, funds are to be used to finance activities that supplement the educational curriculum of the school.

Fundraising activities shall in general contribute to the educational experience of students and shall not conflict with the instructional program. Student activity money shall be expended to benefit a bona fide student group that contributed to its accumulation. Fundraising activities should not be for the individual benefit of a student based on sales, but should be equally distributed to the students holding the fundraiser.

The School Club Advisor of each school organization is required to ensure that adequate financial records are maintained. These records, which are subject to audit, should include, at a minimum, the following:

- Monthly General Ledger Report
- Advisor's copy of cash receipt forms
- Advisor's copy of Ticket Sale Logs
- Advisor's copy of Ticket Sales and Reconciliation Reports
- Advisor's copy of Purchase Orders
- Advisor's copy of Club Annual Budget Plan

Funds derived from the student body as a whole shall be expended in a manner benefiting all students. The management of student activity funds shall be in accordance with sound business practices, including established budgetary and accounting procedures.

The following is a schedule of some of the appropriate uses and prohibited expenditures from Student Activity Funds. The list is not all-inclusive, but can serve as a guideline. Any questionable items should be verified through the Business Office.

Note: Any equipment purchased with student activity funds or school activity accounts will become the property of LPI and must be included in the fixed asset inventory of the school.

### ***Summary of Acceptable and Unacceptable Expenditures for Student Activity Funds***

#### ***Acceptable uses:***

- Supplies & materials to be used by student members of the group.
- Entry fees & other expenses associated with competitions & meetings once all possible resources have been considered.
- Travel expenses & meals consumed by the student members & their adult sponsors (travel disbursements must be documented).

- Membership in related organizations.
- Charitable contributions & scholarships (to be approved by President).
- Expenditures related to parties & other entertainment of student members.
- Equipment to be used by the student members of the organization.
- Light refreshments such as pastries & coffee for Open Houses, Parent Night, or other parent/student functions.
- Other reasonable expenditures approved by student membership of the group.

*Unacceptable uses:*

- Any purchases not approved by the student membership of the group.
- Any purchases which benefit adult sponsors & does not benefit student members
- The use of the charter buses or other transportation that has not been approved by LPI.
- Replacement of an individual's property that was lost, stolen, or damaged on the school's premises or while being used at a school function. The Texas Tort Claims Act prohibits use of funds in this manner.
- Gift cards, gift certificates, or the like for district employees.

**Responsibilities**

All school personnel will be held responsible for any school activity and student activity funds entrusted to them. The responsible party will reimburse the Club/Sport Account for money (or property purchased with student activity funds) which is lost due to carelessness, fraud, or theft due to carelessness.

The Business Manager is responsible for the overall administration of the Student Activity accounts including the bookkeeping, monthly reporting and compliance with the policies and procedures manual. The principal will approve all group/sport/student fundraising activities in advance and will monitor the activities by reviewing and signing the "Fundraising/Sales Activity Application". It is the principal's obligation to see that all faculty sponsors have signed the "Responsibilities of Faculty Sponsors of Student Groups" and to ensure that these forms are kept on file.

Lydia Patterson Institute handles Student Activity Funds and has a safe available for use to safeguard any funds that are deposited with the bookkeeper.

The Business Manager (or designated employee) is responsible for the following:

- Maintaining the accounting records as required in the administrative procedures manual.
- Preparing payment authorization request when properly authorized by the President.
- Receiving money and issuing a receipt.
- Preparing and making deposits.
- Preparing and filing all transactions on a monthly basis.

The Advisor of a student activity group/sport is responsible for safeguarding and accounting for all student activity funds entrusted to him/her. It is the obligation of the faculty sponsor to follow the procedures provided. This includes maintaining detailed

financial records and for maintaining a positive balance in the respective account at all times. The faculty sponsor will sign a “Acknowledgement of Responsibilities of Faculty Sponsors of Student Groups” form, before undertaking the sponsorship of a student club or organization. If sponsors do not receive proper student activity training and forms are not filled out, sponsors will not be allowed to conduct any fundraising activity. Sponsors must ensure that “Club Meeting Sign-in Sheets”, and “Activity Fund Club Minutes” and the “Club Treasurer’s Reports” are completed and maintained.

**SECTION: Fiscal Management**  
**POLICY: Accounting for Fundraising**  
**POLICY #: 9.10**

**Accounting for Fundraising**

Fundraising is an organized activity to raise funds for an organization or school. Under no circumstances should organizations participate in door-to-door solicitation, donation campaigns of any kind (examples: formal solicitations, letter campaigns, etc.) nor enter into agreements with solicitation firms. LPI is not allowed to conduct raffles, bingo, and other games of chance.

Under no circumstances should an organization enter into agreements or advertise an event until approvals from the President has been received.

**CASH MANAGEMENT**

The Business Office in collaboration with the accountant firm, reconciles all cash and investment accounts on a monthly basis. Each bank account is reconciled within 30 days of the month end. Once all reconciling entries have been made, the reconciliations are then reviewed and approved by the accountant. Copies of school reconciliations are forwarded to president and all reconciliation reports are kept on file in the Business Office.

**Cash Management Procedures:**

All funds collected on behalf of LPI will adhere to the following:

- At least 2 people should be assigned to the handling of funds during an activity.
  - One for collecting/receipting; the other for preparing and making deposits.
- Cash should not be left unattended.
- Cash/Funds Handling:
  - Count and verify the cash received while in the presence of the person presenting the cash.
  - Fill out Ticket Sales & Reconciliation Report
- Checks written should be made to “Lydia Patterson Institute” and should be for the amount of purchase only.
- Postdated checks are not to be accepted. Checks are not to be held.
- Checks should be restrictively endorsed with the activity event and club name and “For Deposit Only” immediately upon receipt.
- A Ticket Sales & Reconciliation Report should be filled out for all events/activities.
- Sales on the spot (concessions, table selling papas locas, etc) should have a Concessions/Snack Bark Inventory Form for auditing purposes.

**Event tickets**

- A Ticket Distribution/Collection Log must be filled out for these kind of activities
- A Sales Log must be filled out by all sellers.
- Only authorized tickets issued through Business Office are acceptable for use.
- All tickets should be turned in with deposit and completed Ticket Sales & Reconciliation Report.

- If it is necessary to void a ticket, put “VOID” on the ticket. Voided tickets should be returned with deposit.
- Since large amounts of money are collected at ticketed events, the following procedures should be followed:
  - Assign two people to each door. One person to sell tickets and collect money; the other person to collect the tickets at the gate. If it is necessary to sell tickets at more than one location, separate cash boxes and reconciliations should be completed. Also, ticket sales and collections for each individual event should be accounted for and kept separate. For example, proceeds for a concessions that is held during a sport game should be collected and accounted for separately.

**Cash Depositing Procedures:**

- Cash shall be presented in the form collected to the Business Office along with Ticket Sales & Reconciliation Report, tickets and Ticket Sales Sheet.
- Cash shall be counted by collector in the presence of the Administrator at the time of collection. A Ticket Sales & Reconciliation Report should be complete.
- Deposit is to be put into a deposit bag and turned in to the Business Office as soon as possible. A “mail slot” is available in the Business Office for after hour events.
- If it is necessary to void a ticket put “VOID” on the ticket and include in the deposit.
- Deposits are to be made on a daily basis. There is NO reason for cash deposits to be unsecured.
- Any discrepancies found at any step in the process should be reported on documentation for immediate resolution.
- If deposit is made during business hours, Business Office staff will count deposit in front of person making deposit. If deposit is made after hours, the deposit will be counted as soon as possible the next business day in front of a second person.
- The Ticket Sales & Reconciliation Report will be completed by Business Office staff. A copy of the deposit receipt will be provided to depositor (white copy).

Please allow 72 hours for verification and entry of deposit into school accounts. Being out of authorized tickets, receipt books, Ticket Sales & Reconciliation Reports or deposit bags is not an acceptable reason for noncompliance with collection and deposit procedures.

The Business Office staff will tally and initial the receipts, run a tape of checks and cash, and reconcile to the cash and checks on hand on the day of deposit. The receipts are then prepared for deposit and enter it into the Financial Accounting System (Praxi). The Business Manager will run a separate tape with the deposit preparation and reconcile to the totals on the receipt log. Copies are made of all checks, cash receipts, and deposit receipt prior to delivering to the bank. All backup documentation is maintained with the Journal Entry documentation for audit records.

The school also receives many of its funds electronically. The Business Manager

checks the on-line banking system for the general operating account for electronic deposits received. As funds are received, confirmation is made and processed.

ALL employees handling funds on behalf of Lydia Patterson Institute will be required to attend a mandatory annual training session.

**SECTION: Fiscal Management**  
**POLICY: Accounting for Donations**  
**POLICY #: 9.11**

**Accounting for Donations**

The purpose of this policy is to establish clear procedures and internal controls for the solicitation, acceptance, acknowledgment, and handling of donations—both cash and non-cash—by student groups and advisors. This policy ensures financial accountability, donor transparency, and institutional compliance.

This policy applies to all student groups, faculty/staff advisors, and any LPI personnel engaged in fundraising, collecting donations, or handling funds on behalf of the school or its student organizations.

**Policy Guidelines**

**1. Pre-Approval Requirement**

- Any student group or advisor planning to solicit donations must first receive written approval from the Development Director.
- This applies to all donations, including cash, checks, gift cards, supplies, services, or other in-kind contributions.
- Donations may be designated for a specific student group or for the school at large.

**2. Processing of Donations**

- All donations must be deposited with the Business Office, whether cash or non-cash.
- No exceptions. Under no circumstances should donations or receipts be taken home, stored in classrooms, or handled outside official channels.
- The advisor must complete a Donation Acknowledgement Form, which must include:
  - Donor's full name and contact information
  - Description or amount of the donation
  - Purpose or designation of the gift
  - Signature approval from the Development Director

**3. Donor Acknowledgment**

- The Business Office will issue an Acknowledgement Letter to each donor confirming:
  - The nature and amount of the donation
  - The intended use of the donation
- An Annual Giving Statement will also be sent to donors at the start of the calendar year for IRS tax reporting purposes.
- These records support both auditing requirements and donor transparency.

**4. Deposit Procedures and Accountability**

- All funds collected must be submitted to the Business Office for deposit on the same business day the funds are received.
- Receipts for all expenditures must be submitted to the Business Office within three (3) business days after the completion of any travel or event.
- Failure to reconcile or submit receipts will result in the advisor being personally responsible for unreconciled funds.

### **5. Oversight and Investigations**

- All reports or suspicions of mismanagement, mishandling, or fraud involving donations or cash collections will be investigated immediately.
- The Business Manager reserves the right to:
  - Request additional documentation or explanation for any transaction
  - Delay or deny reimbursement or disbursement until compliance is met
  - Conduct internal audits of student organization funds at any time

### **6. Red Flags and Irregularities**

The following issues are considered red flags and will be reviewed by the Business Office:

- Deposits not being made on a daily basis
- Fundraising activities with no corresponding deposits or expense reports
- Large, irregular deposits not supported by receipt logs
- Mismatched totals between receipts and deposit tickets
- No financial activity reported from student groups running ongoing fundraisers
- Receipt of past due invoices
- Negative account balances for student groups or organizations

### **7. Enforcement**

Failure to comply with this policy may result in:

- Loss of fundraising privileges
- Disciplinary action for the advisor and/or group
- Referral to the President or Executive Leadership Team for further review

### **8. Policy Review**

This policy shall be reviewed annually by the Business Office in collaboration with the Development Office and school leadership. Updates and changes must be approved by the President.

**SECTION: Fiscal Management**  
**POLICY: Scholarship to LPI from Club**  
**POLICY #: 9.12**

**Scholarship to LPI from Club**

This policy establishes the procedures and requirements for LPI student clubs or organizations that wish to award scholarships to graduating students using funds from their student activity accounts. It ensures transparency, accountability, and appropriate use of student club funds while supporting students in their pursuit of higher education.

**1. Application for Scholarship Approval**

- Any student club or organization that intends to award a scholarship must submit a Scholarship Proposal Packet to the President's Office by December 1st of the current school year.
- The packet must include:
  - Scholarship criteria (eligibility requirements)
  - Selection process
  - Scholarship Application Form
- The President will review and approve all scholarship proposals, criteria, and forms before any promotion or selection process may begin.

**2. Selection and Award Process**

- Once the scholarship criteria are approved, the club may promote the opportunity and begin the selection process.
- All scholarship recipients must be selected and submitted to the President's Office no later than March 15th using the official Club Scholarship Award Form, which must include:
  - Full name(s) of the scholarship recipient(s)
  - Amount awarded to each student
  - Name of the student club or organization
  - Name/title of the scholarship
  - Student activity account number funding the award
  - Any additional scholarship requirements or terms
- All final scholarship awards are subject to approval by the President.

**3. Financial and Documentation Requirements**

- Club sponsors are responsible for ensuring that the club's student activity account contains sufficient funds to cover the full amount of all awarded scholarships.
- Once awarded, students must:
  - Submit the Scholarship Award Letter to the Business Office
  - Provide proof of college admission and enrollment (e.g., acceptance letter, registration confirmation)
- Upon verification, funds will be transferred from the student activity account to the appropriate LPI financial aid account or scholarship ledger for application on behalf of the student.

#### **4. Deadline to Claim Award**

- All scholarships must be claimed by June 30 of the awarding school year.
- Scholarships not claimed by this date will be forfeited, unless alternative arrangements were requested in writing and approved in advance by the President.
- Unclaimed scholarship funds will:
  - Remain in the original student activity club account for future awards at the club's discretion, OR
  - Be reallocated to another active student organization at the discretion of the President if the original club no longer exists.

#### **5. Oversight and Compliance**

- All club-sponsored scholarships must comply with LPI policies regarding:
  - Equity and fairness in the selection process
  - Financial transparency and responsible use of student activity funds
  - Timely reporting and documentation
- The Business Office and President's Office will maintain records of all club-issued scholarships for auditing and reporting purposes.

#### **6. Enforcement**

Failure to follow this policy may result in:

- Delays in scholarship approval or disbursement
- Revocation of fundraising privileges for the club or organization
- Further review by school leadership for potential misuse of student activity funds

#### **7. Policy Review**

This policy will be reviewed annually by the President's Office in consultation with the Business Office. Updates or modifications may be made to ensure consistency with institutional priorities and compliance standards.

**SECTION: Fiscal Management**  
**POLICY: Other Financial**  
**POLICY #: 9.13**

**Other Financial Management Policies**

**Tax-Exempt Status**

LPI is a qualified, tax-exempt educational institution under Texas law. Purchases made for LPI-related purposes are exempt from Texas sales and use tax, provided that the purchases are related to the school's exempt function.

- The Tax Exempt Form must be submitted to the vendor prior to making purchases.
- Sales tax should never be paid on school-related transactions.
- Any staff member or advisor who pays sales tax on a purchase will not be reimbursed, and the cost of the tax will be the responsibility of the individual making the purchase.

**Petty Cash**

- No club, department, or individual may create or maintain a petty cash account.
- All monies collected must be immediately deposited with the Business Office upon receipt.
- Funds must never be stored in offices, classrooms, homes, vehicles, or other unsecured locations.

**Relationship with Parent Organization**

LPI recognizes and appreciates the support of parent organizations. However, to ensure alignment with institutional policy, all affiliated organizations must adhere to the following:

- Organizations must operate in a manner consistent with LPI's mission, values, and policies.
- Use of school facilities requires prior approval from the appropriate administrator.
- Before purchasing equipment, hardware, or software for the school, parent groups must notify the President. The President, in consultation with department heads, will determine if the equipment is compatible with existing infrastructure.
- Parent organizations may not use LPI's tax-exempt status or federal tax ID number for purchases or fundraising.
- Parent organization funds are independent of LPI activity funds and may not be commingled or influence the school's internal financial decisions.

**Note:** Parent organizations operate independently. The Business Manager is not responsible for their funds, and those funds must never be handled or accounted for by LPI employees or merged with LPI financial systems.

**Responsibility and Oversight of Student Activity Funds**

The Business Office is responsible for ensuring that all activity fund transactions comply with LPI policies, procedures, and applicable laws.

The Business Manager is accountable for:

- Proper collection, disbursement, and control of all activity funds.

- Training, verifying, and supervising all personnel authorized to handle funds.
- Providing secure storage and oversight of all school-held monies.
- Maintaining full records of all receipts, disbursements, and documentation.
- Ensuring that delegation of duties does not reduce overall responsibility or accountability for financial compliance.

### **Fraud and Financial Impropriety Policy**

LPI maintains a zero-tolerance policy toward financial fraud or misconduct. All staff, faculty, and trustees are expected to uphold the highest standards of integrity and diligence in handling school resources.

#### **Prohibited actions include (but are not limited to):**

- Forgery or unauthorized alteration of checks, documents, or records
- Theft or misappropriation of funds, supplies, or assets
- Misreporting or concealing financial transactions
- Unauthorized use of confidential financial information
- Personal gain from insider knowledge
- Accepting bribes or gifts from vendors
- Falsifying receipts or reimbursement claims
- Failure to disclose conflicts of interest
- Destruction or misuse of school financial records or equipment
- Failure to comply with federal or state reporting requirements for grants or awards

Any instance or allegation of fraud will be promptly investigated and may result in:

- Termination of employment
- Referral to law enforcement and potential prosecution
- Recovery of losses through legal action or insurance claims

### **Reporting Suspected Fraud – General Protocol**

Anyone with knowledge or suspicion of fraudulent activity must report the issue immediately.

Reports may be made to:

- An immediate supervisor
- The President

Anonymous reports are permitted. LPI will take all allegations seriously and investigate appropriately. Retaliation against whistleblowers is strictly prohibited as outlined in the school's Whistleblower Policy.

### **Fraud Investigation Guidelines**

- Do not independently investigate suspected fraud.
- The President will determine whether to involve law enforcement, legal counsel, or outside auditors.
- Managers must consult the President before taking any personnel actions.
- No one should confront or discuss the suspected issue with the accused without authorization.
-

- All discussions and records must remain confidential and professional to avoid false accusations or due process violations.

The President may oversee or delegate investigations. LPI may cooperate fully with law enforcement agencies and make every effort to recover losses. The President will also review investigation findings and implement internal control improvements where needed.

**SECTION: Fiscal Management  
POLICY: Investment Reporting  
POLICY #: 9.14**

**Investment Reporting**

The Board of Trustees take action on investment related issues. Those are:

- The Board of Trustees shall review the district investment policy and investment strategies not less than annually.
- Following the annual review the Board must adopt a written resolution stating the investment policy and strategies have been reviewed, and that the adopted resolution records any changes made to either the investment policy or strategies.
- Each requires board action to be recorded in the minutes of the Board meeting. Not less than quarterly, the investment officer shall prepare and submit to the Board a written report of investment transactions for all funds. This report shall be presented to the Board and the President not less than quarterly, within a reasonable time after the end of the period. The report must:
  - Contain a detailed description of the investment position of the school on the date of the report;
  - Be prepared jointly and signed by all investment officers.
  - The report must state:
    - Beginning market value for the reporting period;
    - Additions and changes to the market value during the period;
    - Ending market value for the period; and
    - Fully accrued interest for the reporting period.
    - State the book value and market value of each separately invested asset at the beginning and end of the reporting period by the type of asset and fund type invested.
    - State the maturity date of each separately invested asset that has a maturity date.
    - State the account or fund or pooled group fund for which each individual investment was acquired.

If the school invests in other than money market mutual funds, investment pools or accounts offered by its depository bank in the form of certificates of deposit, or money market accounts or similar accounts, the reports shall be formally reviewed at least annually by an independent auditor, and the result of the review shall be reported to the Board by that auditor.

## **Investment Strategies**

As part of the investment policy, the Board shall adopt a separate written investment strategy for each of the funds or group of funds under the Board's control.

Investments shall be made with judgment and care, under prevailing circumstances that a person of prudence, discretion, and intelligence would exercise in the management of his or her own affairs, not for speculation, but for investment, considering the probable safety of capital and the probable income to be derived. Investments shall be governed by the following objectives in order of priority:

- Preservation and safety of principal;
- Liquidity; and
- Yield.

In determining whether an investment officer has exercised prudence with respect to an investment decision, the following shall be taken into consideration:

- The investment of all funds, rather than the prudence of a single investment, over which the officer had responsibility.
- Whether the investment decision was consistent with the Board's written investment policy.

## **Investment Officers**

Lydia Patterson Institute shall designate one or more officers or employees as investment officer(s) to be responsible for the investment of its funds. In the administration of the duties of an investment officer, the person designated as investment officer shall exercise the judgment and care, under prevailing circumstances that a prudent person would exercise in the management of the person's own affairs, but the Board retains the ultimate responsibility as fiduciaries of the assets of the school. Unless authorized by law, a person may not deposit, withdraw, transfer, or manage in any other manner the funds of the investing entity. Authority granted to a person to invest the school's funds is effective until rescinded by the school or until termination of the person's employment by the school, or for an investment management firm, until the expiration of the contract with the school.

LPI's investment officers are the President, Finance Chair of Finance Committee, Investment Chair of Investment Subcommittee and other board members.

A school investment officer who has a personal business relationship with a business organization offering to engage in an investment transaction with the school shall file a statement disclosing that personal business interest. An investment officer who is related within the second degree by affinity or consanguinity to an individual seeking to sell an investment to the investment officer's school shall file a statement disclosing that relationship. A required statement must be filed with the Board and with the Texas Ethics Commission.

A written copy of the investment policy shall be presented to any person offering to engage in an investment transaction with the school or to an investment management

firm under contract with the school to invest or manage the school's investment portfolio. For purposes of this section, a business organization includes investment pools and an investment management firm under contract with the school to invest or manage the school's investment portfolio. The qualified representative of the business organization offering to engage in an investment transaction with the school shall execute a written instrument in a form acceptable to the school and the business organization substantially to the effect that the business organization has:

- Received and thoroughly reviewed the school investment policy; and
- Acknowledged that the business organization has implemented reasonable procedures and controls in an effort to preclude investment transactions conducted by the school.

The investment officer may not acquire or otherwise obtain any authorized investment described in the school's investment policy from a person who has not delivered to the school the instrument described above.

### **Legal Requirements**

Record retention ensures that critical records are identified and retained in accordance with State and Federal guidelines. The Local Government Records Act establishes the primary requirements for records retention policies and plans. These record retention guidelines are specified in the retention schedules and approved by the State Library and Archives Commission.

In addition, the Local Government Records Act requires the school to elect a Records Management Officer to coordinate the school's records management activities. The school's Records Management Officer is the Business Manager.

### **Records Control Schedule**

Records will be maintained through electronic storage for five years. Disposal of paper copies will follow the school's practice of seven year retention.

School and department officials and/or their designee should bring forward any and all records that can be destroyed on a timely basis.

**SECTION: Financial Management**  
**POLICY: Court Ordered**  
**Withholdings**  
**POLICY #: 9.15**

**Court Ordered Withholding**

Lydia Patterson Institute is obligated to report on the termination of employees who are subject to a court order or writ of withholding for child support or spousal maintenance.

The following details must be promptly submitted by the Business Office to the support recipient and the appropriate entity (such as the court or the Texas Attorney General Child Support Division in the case of child support) within seven days of the employee's termination:

- Termination of employment
- Last known address of the employee
- Name and address of the employee's new employer, if available

**SECTION: Financial Management**  
**POLICY: Asset & Inventory**  
**POLICY #: 9.16**

**Asset and Inventory Management Policy**

Lydia Patterson Institute (LPI) maintains strict standards for the management, tracking, and disposal of school assets and inventory. This policy ensures accountability, accuracy in financial reporting, and responsible stewardship of school resources.

**1. Inventory Management**

- Each department is entrusted with different types of inventories.
- All inventory documentation is maintained in the Business Office.
- Inventories are maintained on all equipment and materials purchased as individual items.
- A complete inventory review is conducted annually during the spring semester.
- Each inventory item will receive an identification tag, and any changes to inventory status (transfer, disposal, damage, etc.) must be reported immediately to the Business Office.

**Threshold for Inventory Items:**

- Items costing between \$500 and \$4,999 per unit and having a useful life of one year or more are tagged and accounted for as inventory.
- These items remain on the inventory list until sold, deemed unusable, or declared unsafe.

**Examples of Inventory Items (not exhaustive):**

- Cameras/camcorders
- Chain saws
- Copiers (non-leased)
- Computers, laptops, iPads
- Executive chairs (\$300 or more)
- Fax machines
- File cabinets
- Floor machines (vacuums, scrubbers, polishers)
- Networking equipment (hubs, routers, servers, switches)
- Ice machines
- Instructional technology items
- Ladders
- Laminators
- Lawnmowers
- Microwave ovens
- Pressure washers
- Projectors

- Printers and scanners
- Radios/walkie talkies
- Weed-eaters

## **2. Capital Assets**

By school definition, capital assets are items of economic value that could be converted to cash and must be capitalized if purchased at \$5,000 or greater.

### **Categories of Capital Assets include:**

- Land
- Land improvements
- Buildings
- Building improvements
- Construction in progress
- Furniture and equipment
- Vehicles

Capital assets are reported and tracked separately from inventory.

## **3. Asset and Inventory Oversight**

- Asset and inventory management is a shared responsibility across all employees.
- The Support Services Department is responsible for:
  - Tagging all qualifying items.
  - Monitoring the exceptions report.
- Any deviations (missing tags, unreported changes, lost items) must be reported immediately to the department administrator and the Business Office.

## **4. Asset and Inventory Losses**

When fixed assets or inventory items are lost, stolen, or destroyed, the following procedures apply:

- If stolen or vandalized: the department must complete a Burglary/Vandalism Loss Report Form as primary documentation.
- If lost or missing: the department must disclose the loss in writing to the Business Office immediately.
- Unless an insurance claim is processed, the department is financially responsible for replacing the lost item(s).

## **5. Surplus Equipment**

The School may dispose of surplus equipment in any manner prescribed by the President, including:

- Donated equipment from private donors or agencies.
  - Equipment purchased by Lydia Patterson Institute.
  - Surplus or salvage equipment owned by Lydia Patterson Institute.
- Before transferring equipment to a student or outside party:

- The transfer must serve a public purpose and benefit Lydia Patterson Institute.
- All confidential or proprietary information must be removed prior to transfer.

#### **6. Technology Surplus and Recycling**

- LPI maintains a technology recycling program for obsolete equipment.
- Payments received from recycling companies will be directed back to Lydia Patterson Institute.
- Scrap metal will be sold to the general public.
- Used vehicles will be sold to vendors at the best market price negotiated by the Maintenance Department.
- All items sold are sold “as is, where is” with no warranties or guarantees.

#### **7. Disposal or Retirement of Capital Assets and Inventory**

- Capital assets and inventory will be sold directly to the general public with a minimum bid equal to fair market value.
- If surplus property has no value, the President may dispose of it at their discretion.
- Retirement of capital assets (through sale, scrapping, or reclassification) requires Business Office approval to prevent unauthorized disposal and to determine whether the item could be reassigned to another department.
- When property is deemed obsolete, disposal will follow these procedures to ensure compliance and accountability.

## SECTION 10: DEVELOPMENT & COMMUNICATIONS

The Development and Communications Department at Lydia Patterson Institute (LPI) serves as the primary steward of Lydia Patterson Institute's story, relationships, and resources. This department is responsible for advancing the mission of LPI by building strong connections with donors, alumni, churches, partners, and the broader community while ensuring that all communications reflect Lydia Patterson Institute's values of faith, hope, resilience, and excellence.

The Department oversees fundraising, donations, grants, marketing, branding, public relations, and special events. Its work ensures that LPI secures the financial resources necessary to sustain scholarships, academic programs, and facilities, while also safeguarding and promoting Lydia Patterson Institute's identity and reputation.

Key responsibilities include:

- **Fundraising & Donor Relations:** Managing annual giving, major gifts, grants, sponsorships, and stewardship of donor partnerships.
- **Communications & Branding:** Ensuring consistent use of LPI's logos, colors, voice, and messaging across all print and digital platforms.
- **Storytelling & Media:** Sharing student success stories, alumni impact, and school milestones in a way that upholds student dignity and advances LPI's mission.
- **Grant Writing & Reporting:** Coordinating grant proposals, compliance, and post-award tracking in collaboration with faculty and staff.
- **Special Events:** Planning and managing donor receptions, fundraising events, campaign launches, alumni gatherings, and other activities that elevate LPI's visibility.

Through its efforts, the Development and Communications Department ensures that Lydia Patterson Institute is not only well-supported financially, but also well-represented in the community, across the region, and beyond.

**SECTION: Development &  
Communications**  
**POLICY: Grant Collaboration**  
**POLICY #: 10.01**

**Grant Collaboration**

The Development Office manages all aspects of grant writing, submission, and reporting on behalf of Lydia Patterson Institute (LPI). To support this work, faculty and staff may be asked to:

- Share program descriptions, curriculum outlines, or academic initiatives.
- Provide impact stories, student testimonials, or inspirational quotes that illustrate program effectiveness.
- Contribute classroom photos, videos, or other media (with appropriate student consent forms on file).
- Assist in post-award tracking, program reporting, or data collection to ensure compliance with grant requirements.

Faculty and staff must promptly and accurately respond to Development Office requests, as collaboration ensures transparency, accountability, and continued access to grant funding. No grant proposals may be submitted independently by employees without prior review and approval from the Development Office.

**SECTION: Development &  
Communications**  
**POLICY: Social Marketing**  
**POLICY #: 10.02**

**School Marketing**

Lydia Patterson Institute's logo may not be used by employees without the express permission of the School.

**Messaging, Branding, and Communications**

LPI's brand is one of its most valuable assets. To ensure consistent and professional representation:

- All external communications (printed or digital) must:
  - Use official LPI logos, color palettes, fonts, and templates.
  - Reflect the School's institutional voice: hopeful, respectful, faith-filled, student-centered, and professional.
- All materials must be reviewed and approved by the Development or Communications Office prior to public distribution.
- Unauthorized flyers, newsletters, social media posts, press releases, or email campaigns directed to external audiences are strictly prohibited.

This ensures that all messaging aligns with LPI's mission, protects student dignity, and maintains a unified institutional identity.

**SECTION: Development & Communications**  
**POLICY: Social Media**  
**POLICY #: 10.03**

**Social Media**

LPI's public image is a shared responsibility across the community. Staff are encouraged to:

- Submit story leads, classroom highlights, photos, or meaningful student moments to the Development Office for consideration in official communications.
- Remember that only students with signed media release consent forms may appear in photos, videos, or published stories.
- Ensure that all content reflects student dignity, resilience, and the mission of LPI.

No personal or departmental social media accounts may represent LPI without written approval.

**Ethical Storytelling and Student Dignity**

LPI is committed to ethical storytelling that highlights student strength and transformation rather than perpetuating stereotypes or evoking pity. All stories must:

- Emphasize resilience, hope, and growth.
- Avoid exploitative language, images, or narratives.
- Exclude sensitive details of student hardship unless consent is obtained and the story is reviewed by the Development Office.
- Receive final approval from the Development Office before being shared publicly.

If an employee is uncertain about anything related to LPI social media content, the employee should consult the Communications Director.

- Know and follow Lydia Patterson Institute's Acceptable Use Policy.
- Regardless of your privacy settings, assume that all of the information you share on your social network is public information.
- In the event of a major posting mistake (e.g., exposing private information or reporting confidential information), please let your department head or supervisor know immediately so Lydia Patterson Institute can take the proper steps to help remedy.

**Confidentiality Guidelines**

- Never share or transmit personal information of students, parents, LPI employee, or colleagues online.
- Lydia Patterson Institute employees should not identify students or their families in social media posting unless doing so with permission of the school.
- Do not caption or tag photos of the students.
- Do not post photos of students unless doing so with permission of the school.
- Do not post details (exact time and exact locations) of travel itineraries, including field trips.

**SECTION: Development &  
Communications**  
**POLICY: Confidentiality & Donor  
Boundaries**  
**POLICY #: 10.04**

**Confidentiality and Donor Boundaries**

LPI protects the privacy of both its students and its donors. The following are strictly prohibited:

- Disclosing a student's scholarship or financial aid status.
- Discussing or speculating on donor giving levels, motivations, or capacity.
- Promising naming rights, sponsorships, or financial benefits without prior approval from the President or Development Office.

All donor-related communications must flow through the Development and Communications Office. Employees should not engage directly in donor solicitation or stewardship unless specifically delegated to do so.

**SECTION: Development & Communications**  
**POLICY: Special Events Coordination**  
**POLICY #: 10.05**

**Special Events Coordination**

All special events—whether held on-campus or off-campus—that involve external guests, donors, alumni, or media presence must be coordinated with or directly managed by the Development and Communications Office. This includes, but is not limited to:

- Fundraising events.
- Donor receptions, recognition dinners, or partner-hosted events.
- Campaign launches, dedications, or building openings.
- Alumni reunions and gatherings.
- Public performances or activities where students represent LPI.

No department, club, or staff member may independently plan or host events that raise LPI's public profile or involve donors without prior consultation and written approval.

This ensures consistent messaging, coordinated logistics, donor relations management, and adherence to LPI's standards of excellence.

**SECTION: Development & Communications**  
**POLICY: Fundraising**  
**POLICY #: 10.06**

## **Fundraising**

LPI employees may not solicit or accept any donations or gifts without prior approval from the Development Office. Fund drives and collections of any other kind (bake sales, t-shirt sales, etc.) are not to be scheduled without the explicit process of supervisor and approval the Development Office. Such approval can be sought by using the Fundraising Request Form. Budget funds are allocated to each club. Supplemental items needed to correlate with curriculum are included in classroom budgets. School supplies for students should be requested from students/parents.

The purpose of this policy is to establish clear procedures and internal controls for the solicitation, acceptance, acknowledgment, and handling of donations—both cash and non-cash—by student groups and advisors.

This policy applies to all student groups, faculty/staff advisors, and any LPI personnel engaged in fundraising, collecting donations, or handling funds on behalf of the school or its student organizations.

### **Policy Guidelines**

#### **1. Pre-Approval Requirement for Fundraising Events**

- Any student group or advisor planning to conduct fundraising events must first process the form through Student Activities Director, supervisor and final approval from the Development Director.
- All proceeds must be processed through the Business Office—refer to Accounting for Fundraising and Donations section.

#### **2. Pre-Approval Requirement for Donations**

- Any student group or advisor planning to solicit donations must first obtain written approval from the Development Director.
- This applies to all donations, including cash, checks, gift cards, supplies, services, or other in-kind contributions.
- Donations may be designated for a specific student group or for the school at large.
- All donations must be processed through the Business Office—refer to Accounting for Fundraising and Donations section.

### **Coach-Led and Club Fundraising**

In keeping with tradition, athletic coaches and club advisors are permitted and

encouraged to conduct team-specific fundraising in alignment with program needs. These activities may include:

- Community-based product sales.
- Car washes, or sponsorship efforts.
- Participation in athletic fundraising events (e.g., tournaments, runs, community events).

**Guidelines for Coach-Led and Club Fundraising:**

- All activities must be approved in advance by school administration.
- Efforts must align with LPI’s mission and values and avoid conflicts with institutional fundraising campaigns.
- All proceeds must be submitted directly to the Business Office for accounting and financial transparency.
- Coaches and advisors must avoid duplicate solicitations or overlap with institutional donor outreach managed by the Development Office.

While the Development and Communications Office manages major gifts, grants, and institutional fundraising, coaches may continue team-level fundraising activities within these guidelines. This dual approach ensures program autonomy while preserving institutional consistency.

# **SECTION 11: GENERAL INFORMATION**

**SECTION: General Information**  
**POLICY: Reverence Policy**  
**POLICY #: 11.01**

**Reverence Policy**

This policy applies to the entire school, to ensure that God's name, character, and truth are honored and respected at LPI. In all areas of instruction, especially Religion classes and related activities, proper respect and consideration of God's character will be given. Specifically, class songs, skits, stories, and discussion that include references to the name and attributes of the Lord must be consistent with biblical principles.

Things to avoid include:

- Silly or trite references to Jesus Christ.
- Implying, directly or indirectly, that all the students are Christians.
- Mockery of angelic powers, whether demonic or heavenly.
- Emphasis on good feelings or works, vs. humble obedience and grace.

For the sake of the students' spiritual training and the work of LPI, joyful encouragement and instruction in reverential knowledge of the Lord is necessary, honored, and respected at LPI.

**SECTION: General Information**  
**POLICY: Employment Records**  
**POLICY #: 11.02**

**Employment Records**

Lydia Patterson Institute must maintain accurate employment records for all employees to comply with state and federal regulations, update benefits information, and ensure important mailings reach employees. All information in personnel files is confidential and the property of the institute. Employees need to notify the institute of any changes to their personnel file and inform their supervisor and the President of any changes in status or outside training.

**SECTION: General Information**  
**POLICY: Use of Facilities**  
**POLICY #: 11.03**

**Use of Facilities**

Staff members who wish to use LPI facilities during or after regular school hours must follow established procedures. You must go through the Principal for facility use during regular school hours. The President or her designated representative is solely responsible for approving and coordinating all after-hours facility use—excluding athletics and scheduled school events.

To request access and receive information regarding availability, requirements, and expectations, staff must contact the President's Office in advance. Unauthorized use of school facilities is strictly prohibited and poses a serious liability risk to the institution.

**Key Guidelines**

- All requests must be submitted in writing or through official school communication channels.
- Facility use may not interfere with scheduled events, custodial operations, or campus safety protocols.
- Staff must ensure all areas used are left clean, undamaged, and properly secured.
- Staff members are strictly prohibited from lending, assigning, or allowing others to use school facilities on their behalf.
- Hosting or permitting unauthorized external use—no matter how formal or informal—creates significant legal, financial, and reputational risk for LPI and is strictly prohibited.
- External individuals, groups, organizations, family members, or friends may not use LPI facilities under a staff member's name or presence.

**Consequences for Noncompliance**

Failure to follow procedures or obtain proper authorization may result in:

- Immediate suspension of facility access privileges
- Formal disciplinary action, up to and including written reprimand, suspension, or termination
- Personal responsibility for any damage, injuries, or legal costs incurred
- Revocation of future facility use privileges
- Referral to the President for review of professional conduct

In cases involving unauthorized external use or lending of facilities:

- Immediate termination
- Staff may be held personally liable for resulting damages, injuries, or legal consequences

This policy exists to protect lives, preserve the integrity of our institution, and secure the future of our ministry. No staff member has the authority to bypass procedures. LPI expects every employee to act with integrity, caution, and full accountability when using or requesting access to school facilities.