

**PHOENIXVILLE AREA SCHOOL DISTRICT
PHOENIXVILLE, PENNSYLVANIA**

ADMINISTRATIVE EVALUATION AND COMPENSATION PLAN

ACT 93 PLAN

BETWEEN THE

**PHOENIXVILLE AREA SCHOOL DISTRICT
(PASD)**

AND THE

**PHOENIXVILLE AREA SCHOOL DISTRICT ADMINISTRATORS
(PASDA)**

JULY 1, 2007 THROUGH JUNE 30, 2011

**Approved by the Phoenixville Area School District
Board of School Directors
on the Fifteenth day of February 2007**

ADMINISTRATIVE EVALUATION AND COMPENSATION PLAN (ACT 93 PLAN)
between the
PHOENIXVILLE AREA SCHOOL DISTRICT (PASD)
and the
PHOENIXVILLE AREA SCHOOL DISTRICT ADMINISTRATORS (PASDA)

JULY 1, 2007 THROUGH JUNE 30, 2011

The Phoenixville Area School District Board of School Directors agree to provide the following salary and fringe benefits for the Phoenixville Area School District Administrators beginning July 1, 2007 and shall continue in full force and effect until June 30, 2011.

Phoenixville Area School District Administrators

Mark Agatone

Karen Coldwell

Maryann T. Cox

Troy Czukoski, Ed.D.

Scott Davidheiser

Faith A. Dobbs

George M. Frazier

Frank L. Garritano

Chris Gehris

Ann Marie Geissel

Amber L. Gentile

Raymond Jenkins

Richard Kaskey

Charles M. Kramer

Rita Lynn

Carolyn Marchetti

Kristine L. McArthur

Phoebe McLaughlin, Ed.D.

Ronald Miller

Scott Millward

Nan Odenthal

Craig Parkinson

Margaret C. Pearsall

Susan Raimondo

Bryan Ruzenski

Virginia Salava

Mary Jane Weiss

Catherine S. Varady

Kenneth Winston

Stephanie Zdrazil

Board of School Directors

Jill Slawecki, Board President

Mary Croke-Parris, Board Secretary

NEWS RELEASE

February 15, 2007

For Release Immediately

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Ms. Maryann Cox, Act 93 Chief Negotiator – 610-960-4795, coxmt@pasd.k12.pa.us

Phoenixville Area Board of School Directors and Act 93 Administrators Group Approve Four-Year Compensation and Evaluation Plan

Major Provisions Include Increased Employee Contributions to Health Benefits and Salary Increases Tied to Cost-of-Living and Performance Evaluations

Phoenixville, Pennsylvania – The Phoenixville Area Board of School Directors and the 30-member Phoenixville Area School District Administrators (PASDA) group have approved a four-year compensation and evaluation plan for District administrators, supervisors, specialists and administrative assistants for the 2007-08, 2008-09, 2009-10 and 2010-11 school years. The plan was approved by the Board at its monthly business meeting on Thursday, February 15, 2007. Approval by members of PASDA occurred on Monday, February 12, 2007.

The four-year plan, in accordance with Act 93, Section 1164, of the Pennsylvania School Code, covers 30 principals, assistant principals, directors, supervisors, specialists, coordinators, managers, and other exempt employees. Under Act 93, these employees are allowed to “meet and discuss” regarding their compensation, benefits and working conditions with the School Board. Four cabinet-level administrative employees – the Superintendent of Schools, Assistant Superintendent of Schools, Director of Human Resources and Business Manager – are not covered by the Act 93 plan because of their close working relationship with the School Board and their involvement in labor negotiations. Therefore, they maintain individual contracts with the Board.

Meet and Discuss sessions between the Board and PASDA began in November 2006. The Board was represented by Chief Negotiator Fred Parry; and Board members Debbie Dawson, Josh Gould, and Nancy McAvoy. The Act 93 group was represented by Chief Negotiator Maryann Cox, Principal of East Pikeland Elementary School; Frank Garritano, Principal of Schuylkill Elementary School; Margaret Pearsall, Supervisor of Reading; and Sue Raimondo, Administrative Assistant.

“The positive attitudes and professionalism of the Act 93 administrators and the School Board members involved in this process, to me, indicate how far Phoenixville Area School District has progressed in its goal to be one of the best districts in the Philadelphia area,” Mr. Parry said. “The meetings were very professional, cordial and respectful. Both parties showed patience, understanding and cooperation in recognizing the current realities of taxes, funding and limited resources in the state and in our district. At the same time, we both understood that excellence in education can only come when we have good leadership and continuity of leadership in Phoenixville.”

Maryann Cox, the Chief Negotiator for PASDA, agreed with Mr. Parry's views.

"The Act 93 discussions with the Board were, as they always have been, respectful, productive and in the best interests of the District," Miss Cox said. "We remained focused and amicable throughout the process, and we are pleased that we were able to come to an agreement that was in the best interest of both parties."

"Both the Board members and the Act 93 team members were very much aware of the financial challenges that Phoenixville and other school districts in Pennsylvania face in putting together budgets under the constraints of Act 1. The Act 93 team, therefore, was very open to agreeing to make monthly contributions to its health care benefits," Miss Cox said.

"We also made it very clear that we wanted our future salary increases to be tied to the Cost of Living Index and our own merit and performance as administrators," she added.

Salary: Under the four-year Act 93 plan, salary increases will be based partially on the Cost of Living Index for the Philadelphia metropolitan area during the previous twelve (12) months. The increase amount will range from 2.5% to 3.0%, depending on the index for that year. In addition, employees who demonstrate superior performance in the achievement of their annual performance goals could receive from 1.0% to 3.0% in additional merit pay.

Another significant feature in the 2007-2011 Act 93 Plan is that Act 93 members will only be eligible for marketplace adjustments to meet prevailing Chester County salaries for equivalent positions if they achieved performance ratings of 3.5 ("very good") since the start of their employment and/or during the length of the Act 93 plan. In addition, all marketplace adjustments will need to be approved by the Board after being recommended by the Superintendent of Schools and discussed with the Act 93 team.

Benefits: Beginning in the 2007-2008 school year, Act 93 members will contribute \$420 per year toward their base medical insurance plan. Contributions will increase to \$480 per year in 2008-2009; \$540 per year in 2009-2010; and \$600 per year in 2010-2011. These contributions will be in addition to the co-pays Act 93 members pay for doctor visits, generic prescriptions, brand name prescriptions, mail order prescriptions, orthodontic care and vision care.

Both parties stated that the administrative team wanted to send a strong message to the community, taxpayers and other employee groups in the District that it too was willing to assume greater fiscal responsibility in sharing the cost of medical insurance.

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PHOENIXVILLE AREA SCHOOL DISTRICT
ACT 93 PLAN

TABLE OF CONTENTS

Purpose	1
Term of Compensation Plan	1
Membership	1
Job Description/Creation/Elimination	1
Time Frame for Future Compensation Plan	1
Wages and Salary	2
Work Year	2
Length of Work Year	2
Vacation/Holidays	3
Leave for Personal Illness	3
Mileage	4
Bereavement Time	4
Childrearing Leave	4-5
Family and Medical Leave Act	5
Sabbatical Leave	5
Legal Duty Pay Supplement	6
Military Leave	6
Leave of Absence	6
Leave Because of Family Illness	6
Family Leave	6
Leave for Additional Reasons	7
Professional Meetings and Conferences	7
Notification of Sick Leave	7
Tax Sheltered Annuity	7
Confidential Personnel Files	8
Liability and Bonding Insurance	8
Tuition Reimbursement	8-9
Professional Reimbursement	9
Pay Periods	9
Protection of Administrators	9
Satisfactory Termination of Employment	10
Retirement Benefits	10-11
Special Agreement on Insurance Programs	12
Health Care Benefits (Employee 'Cafeteria' Benefit Plan)	12
Life Insurance	12
Medical Insurance	13
Discretionary Expense Fund	14
Dental Care Program	14
Vision Program	14
Prescription Drug Plan	14
Cost Containment Provisions for Opting Out of Health Insurance	15
Disability Income Protection Plan	15
Separability Clause	15
Grievance Procedure	15-18
Administrative Performance Evaluation Plan	19-24
Administrative Performance Evaluation Form	25
Performance Evaluation for Administrative Assistants	26-27
Performance Evaluation for Non-Supervisory, Salaried Employees	28-29

PURPOSE

The Phoenixville Board of School Directors recognizes the importance of maintaining the respect of an effective team of professional administrators (Educational/Technical/ Administration) in order to promote a strong foundation in fostering superior educational programs of the School District and to establish and improve communications, decision-making, conflict resolution, and other relationships inter-related with each other and within our School District. Therefore, the Board adopts this Administrator Compensation Plan ("Plan") as of February 15, 2007.

TERM OF COMPENSATION PLAN

The Plan is effective July 1, 2007 through June 30, 2011.

MEMBERSHIP

Membership shall include all those employees of the School District eligible for membership pursuant to Act 93 as listed in Exhibit "A."

JOB DESCRIPTION/CREATION/ELIMINATION

Current Job Descriptions are written and available in the Office of the Director of Human Resources.

If an Act 93 Administrative position is to be "created and/or eliminated" a meet and discuss will be held between representatives of the Board and a team of PASDA, prior to the finalization of the creation and/or elimination of the position.

TIME FRAME FOR FUTURE COMPENSATION PLAN

Either the School Board or the Phoenixville Area School District Administrators (PASDA) shall notify each other not later than January 31, 2011 of intent to meet and discuss under Act 93, Section 1164, of the Pennsylvania School Code. An initial meeting shall be held as soon as possible after "notification" to commence an intelligent, cohesive, and collaborative understanding for a new administrator compensation plan. In the event notice is not given/provided as required by this Section, this Plan shall continue in full force and effect for another one-year term. In the event that a new Plan is not reached by June 30, 2011, the salary plan included in this Plan remains in effect. Adjustments to those salaries are to be made when a new administrator compensation plan is adopted.

WAGES AND SALARY

Salary increases will be individually calculated for each Act 93 member who has been employed by the School District in an administrative capacity for at least 130 days of the prior 260-day work year (i.e., .5 of a full, 12-month work year). Act 93 members who have been employed less than 130 days in the prior 260-day work year will receive an increase on a prorated basis. Salary increases are granted to become effective on July 1st of each year. The increase amount an individual will receive is based on a combination of a cost of living increase (determined as of May 1st of that year) not to fall below 2.5% or go above 3.0% and the percentage increase as determined by the overall performance rating for the prior year as outlined in the Administrative Performance Evaluation Plan. (See Salary Plan Interpretation Exhibit "B".)

The initial increase to be granted under this Plan will become effective July 1, 2007.

The yearly increase shall be included in the first paycheck following June 30th. Each administrator shall be given a letter, originated by the Director of Human Resources, confirming his/her new salary (base plus performance increase) prior to the Board vote on salaries.

Administrative Assistants, who are paid an hourly wage, will have a yearly increase in salary that will be determined by combining the yearly cost of living increase with any salary increase that is awarded as a result of his/her performance rating.

Non-Supervisory, Salaried Employees will have a yearly increase in salary that will be determined by combining the yearly cost of living increase with any salary increase that is awarded as a result of his/her performance rating.

The Board reserves the right to make favorable (upward) adjustments at any time to any class of administrator based on market conditions.

1% of the Act 93 salary pool will be budgeted annually for the purpose of making marketplace salary adjustments, if necessary. In order to be eligible for a marketplace adjustment, an employee must have an average evaluation rating of 3.5 or higher over the length of the agreement or since the start of employment, whichever is most recent. These adjustments will be proposed by the superintendent, discussed with the Act 93 representative team, and approved by the Board.

WORK YEAR

Administrators shall be employed on twelve (12) month contracts and shall work all days as approved by the Superintendent. The Superintendent determines whether administrators will be required to work on bad weather days or other non-scheduled school closing days. Administrators have the option of taking vacation on bad weather or other non-scheduled school closing days that the Superintendent calls work days.

LENGTH OF WORK YEAR

Administrative employees shall work 260 days per year, minus vacation and holidays.

VACATION/HOLIDAYS

Section 1 - For the Plan period 2007-2011, employees covered under this Plan shall be accorded twenty-five (25) vacation days per year. Each new Act 93 administrator will receive a prorated number of vacation days at the rate of 2.0833 days per month. Their days will be based upon the date of employment and become effective as of the date of employment. Thereafter, he/she will receive twenty-five (25) vacation days per year.

Section 2 – By October 1st of each year, an Act 93 employee may not have more than 34 days of accumulated vacation time. Unusual circumstances may prevent an Act 93 member from using all of his/her vacation days before the October 1st deadline. In such cases, the Superintendent of Schools will approve, on a case-by-case basis, permission to convert any unused days through an IRS compliant deferred payment method. This will not be a common occurrence. The School District shall make a non-elective employer contribution to the employee's 403(b) retirement program for the unused days. The employee shall receive no cash option.

Section 3 - Holidays – The following days are designated as paid holidays for all employees:

New Year's Day
Martin Luther King's Birthday
Presidents' Day
Good Friday
Memorial Day
Fourth of July
Labor Day
Yom Kippur (in accordance with District calendar)
Thanksgiving Day
Day after Thanksgiving Day
December 2007 Winter Recess: December 24, 25, 26, 27, 28, 31
December 2008 Winter Recess: December 24, 25, 26, 29, 30, 31, January 2
December 2009 Winter Recess: December 24, 25, 28, 29, 30, 31
December 2010 Winter Recess: December 24, 27, 28, 29, 30, 31

Section 4 - The Board reserves the right to modify or change a paid holiday due to weather emergency, snow make-up day or other unforeseen emergency. The Board will meet and discuss with the administrators for purposes of rescheduling such holidays for employees in the event of a modification or change.

LEAVE FOR PERSONAL ILLNESS

Personal illness days will be accrued based on one day for each month of active service (twelve sick days per year). Days not used may be accumulated without limit from year to year.

MILEAGE

Team members who use their personal vehicles in order to perform school duties shall be reimbursed at the IRS rate per mile, once a month. This shall include mileage for ALL work-related activities.

BEREAVEMENT TIME

Team members may be absent from duty due to the death of an immediate family member without loss of pay for five (5) days. Members of the immediate family shall be defined as husband, wife, son, daughter, parent, parent-in-law, grandchild or any person with whom the employee has made his/her home. Further, if there is any question about the length of time allowed for bereavement in any individual case, the Superintendent or the Superintendent's designee will determine the appropriate length of time.

Team members may be absent from duty without loss of pay for three (3) days due to the death of any of the following family members: sister, brother, daughter-in-law, son-in-law.

Team members may be absent from duty without loss of pay for one (1) day due to the death of the following relatives: cousin, grandfather, grandmother, aunt, uncle, niece, nephew, brother-in-law, sister-in-law, or grandparent-in-law.

The Superintendent may extend the three periods listed above at its discretion as the exigencies of the case may warrant.

CHILDREARING LEAVE

Childrearing leave begins at the termination of disability leave due to pregnancy and childbirth, or for an adoptive parent a written request must be submitted when the adoption papers are approved by the adoption agency. For an adoptive parent, leave will begin when the adoptive parent leaves to pick up the child.

Maximum length for leave is one (1) year from the date of termination of disability leave for childbirth or from the date of custody of an adopted infant. The Board may extend the leave for an additional year at its sole discretion as circumstances of the case may warrant.

Any employee taking a leave of absence pursuant to this Article shall be entitled to his/her annual increment for any year, provided the employee has worked at least one-half (1/2) of the number of days in the school work year.

Employees' time spent on childrearing leave shall be counted against the employees' annual entitlement to leave under the Family and Medical Leave Act of 1993, P.L. 103-3. Employees on childrearing leave for a period of time beyond the limits set forth in the Family and Medical Leave Act of 1993 (FMLA) may continue their insurance benefits at their own expense until such entitlement is exhausted.

CHILDREARING LEAVE (continued)

Past service and benefits earned prior to the beginning of childrearing leave will be restored to the employee upon return to duty after the leave.

Employee must give sixty (60) days written notice to the Superintendent before returning to his/her professional duties.

FAMILY AND MEDICAL LEAVE ACT

General Entitlement

The employer shall comply with the requirements of the Family and Medical Leave Act of 1993 (hereinafter FMLA) and its corresponding regulations (to the extent that such FMLA regulations have not been held invalid by an appellate court of competent jurisdiction), including the following clarifying provisions. Nothing in this Plan shall be construed to lessen or diminish the rights guaranteed to the employees under the FMLA. It is further agreed and understood that nothing in the FMLA shall lessen or diminish any rights to leave that are contained elsewhere in this Plan or are guaranteed by statute, except as specifically provided herein. All definitions within this section shall correspond to those defined in the Act and its regulations.

Notice by the Employee

Notice of an employee's intent to take FMLA leave shall be given in accordance with the Act. The employer shall not deny an employee's leave request solely because the employee did not provide the requisite notice under the Act.

Documentation/Certification Requirements

Documentation or certification from a health care provider required by the employer shall be in accordance with FMLA. No second opinion shall be required from the employee utilizing FMLA leave for family members. Requirements for documentation or certification regarding employee's ability to return to work shall be the same as those for returning from other paid or unpaid leaves.

Return to Work and Reinstatement Rights

Reinstatement for employees at the conclusion of the FMLA leave shall be in accordance with the Act. Employee assignment upon return shall be consistent with the provisions for other paid and/or unpaid leaves.

SABBATICAL LEAVE

Sabbatical leave shall be granted to employees in the school system in conformity with the School Laws of the Commonwealth of Pennsylvania and the policy and regulations established by the Board of School Directors. (Exhibit "C"—PASD Sabbatical Leave Policy)

LEGAL DUTY PAY SUPPLEMENT

A member who is called upon for jury duty shall notify the Superintendent immediately upon receiving notice of the call. Notification shall be using the "Employee Absence" form. If the member serves jury duty on days normally scheduled to work, the District will provide jury duty pay supplement, making up the difference between jury duty earnings and the normal pay for the days involved. Employee shall provide the School District with written verification of jury duty. Payment of the differential between jury duty pay and regular pay shall be accomplished as follows: the District shall pay employees their full regular salary while on jury duty and employees shall reimburse the District for all jury duty pay amounts received, excluding reimbursable expenses.

Members who are subpoenaed as witnesses for the School District in any court proceedings shall be entitled to their regular daily pay.

MILITARY LEAVE

Military leave will be provided as required by law.

LEAVES OF ABSENCE

Leaves of absence, with or without pay, may be granted by the Board, at its sole discretion, for good reason shown.

LEAVE BECAUSE OF FAMILY ILLNESS

Section 1 - Employees may be absent from work for five days, singly or consecutively, with pay, to attend to a member of their immediate family.

Section 2 - With the Superintendent's written approval, the number of days under Section 1 above may be increased as the situation warrants.

FAMILY LEAVE

The Board shall provide an unpaid leave of absence for up to one semester to any administrative employee who must care for an ill family member, without any loss of seniority privileges or salary placement on the administrative salary range. Any time included in such leave will be counted against the employee's annual entitlement to leave under the FMLA.

LEAVE FOR ADDITIONAL REASONS

Section 1 - Act 93 members shall be granted up to three days of leave, with pay, for additional reasons each year.

Section 2 - The granting of personal leave is at the discretion of the Superintendent or Superintendent's designee. However, it is important that someone in administrative authority of the school or knowledge of the department/section is available for emergencies at anytime (i.e., a "go to" person).

Section 3 - Should an employee cease to be employed by the Board during the year, the employee shall be credited with a prorated number of days of leave for additional reasons based on actual employment.

Section 4 - If not used by the employee, up to and including three (3) of the full paid days of leave for additional reasons, or any portion thereof, shall be added each year to his/her accumulated sick leave.

PROFESSIONAL MEETINGS AND CONFERENCES

Section 1 - The Superintendent shall provide guidelines yearly on conferences and conventions.

Section 2 - All expenses must be itemized and receipts must be presented when possible. If transportation is by automobile, transportation charges shall be approved at the approved IRS rate.

Section 3 - All expenses incurred by employees shall be reasonable and appropriate and shall be subject to review by the Board.

NOTIFICATION OF SICK LEAVE

Each member shall be given a written accounting (on pay stub) of all credited sick leave accumulated at the beginning of each school year.

TAX SHELTERED ANNUITY

The Board agrees to make payroll deductions essential to the Tax Sheltered Annuity programs of the members; however, any member wishing to initiate such a program shall be limited to the existing programs for which deductions are now being made.

CONFIDENTIAL PERSONNEL FILES

Section 1 - Confidential personnel files maintained by the School District shall be available only to the employee involved and such other administrative and/or supervisory personnel duly authorized by the Board.

Section 2 - Each employee shall have the right to examine, copy, and duplicate any material in his/her own confidential file maintained by the School District, except material received in connection with the hiring process and/or prior to the individual's employment by the School District.

Section 3 - Each employee shall have placed in his/her confidential personnel file any material or comments he/she wishes to have included therein pertaining to material already in the file.

Section 4 - Employees shall give the Personnel Office twenty-four (24) hours notice of their intention to act under Sections 2 and 3 above.

LIABILITY AND BONDING INSURANCE

The School District shall provide comprehensive Liability and School Board Legal Liability insurance coverage for each member of Act 93.

TUITION REIMBURSEMENT

Effective July 1, 2000, and thereafter, the Board will reimburse administrative employees' tuition charges for graduate courses taken at fully accredited colleges and universities. Administrative Assistants will also be eligible to take college level/work-related courses. Such reimbursement shall be subject to the following requirements:

- a. Prior written approval issued at the discretion of the Superintendent, or the Superintendent's designee, shall be required for all courses, which the employee submits for reimbursement. All courses must be educational courses taken for a new field of certification, courses taken within a program for a higher degree in a certifiable area, or for Act 48 compliance. All courses submitted by administrative assistants will be considered on a case-by-case basis.
- b. Reimbursement shall be made following submission of a transcript showing evidence of successful course completion with a "B" grade or above, as well as evidence of payment for the course.
- c. Reimbursement for graduate courses for each Act 93 employee will be limited to six (6) credits per semester, not to exceed twenty-four (24) credits in any given fiscal year.
- d. No reimbursement shall be made to an employee completing courses, which have been covered by a scholarship or grant of any type. In cases where a partial scholarship or grant covers only a portion of tuition costs, the Board shall reimburse the difference, subject to the provisions in the above paragraphs.

TUITION REIMBURSEMENT (continued)

- e. The Superintendent, or the Superintendent's designee, may waive the requirement of pre-approval or the requirement that the course must be graduate level.
- f. When a member with fewer than three (3) years of service in the school district leaves, he/she must pay back the entire tuition reimbursement for all credits over three (3) per year of employment.
- g. When an Act 93 administrator receives a doctorate while employed in the School District, the employee will receive a \$1,000 one-time contribution to his/her 403(b). There is no cash option and this \$1,000 does not become part of the annual salary.

PROFESSIONAL REIMBURSEMENT

Each member shall have provided by the School District the cost of three (3) memberships in State and National principals' organizations, or similar professional organizations. Such payment shall be made directly to the organization.

PAY PERIODS

There shall be twenty-six (26) pay periods in the fiscal year beginning July 1st. Yearly salary shall be divided equally among the pay periods.

PROTECTION OF ADMINISTRATORS

A member who is unable to perform duties because of injury sustained as a result of assault incurred in the normal course of duties shall receive a paid leave of absence for the duration for the time period during which the administrator cannot perform his/her regular duties or substitute duties as assigned by the Superintendent, unless the member is found guilty of provocation by a court of law or by the Board of School Directors after a due process hearing is conducted by the Board.

The amount paid to the member shall be the normal salary less the amount of the insurance benefits including workers compensation and/or disability income protection payments, which the member shall be eligible to receive. In addition, the member shall be reimbursed for cost of medical, surgical or hospital services resulting from injury of assault not covered by insurance of either the member or the third party. The Board and any or all designees thereof, in coming to the proper determination for duration may request whatever medical records they deem necessary, which the member hereby agrees to supply.

The duration of the leave of absence shall be initially determined by the Board and any or all designees thereof.

SATISFACTORY TERMINATION OF EMPLOYMENT

Administrators employed for at least five (5) consecutive years as a Phoenixville Area School District Administrator who terminate with satisfactory employment are entitled to reimbursement of unused sick days as follows:

- \$ 80.00 for each day of unused sick leave for 5-7 years of service in PASD.
- \$100.00 for each day of unused sick leave for 8-10 years of service in PASD.
- \$120.00 for each day of unused sick leave for 11-13 years of service in PASD.
- \$130.00 for each day of unused sick leave for 14-15 years of service in PASD.
- \$140.00 for each day of unused sick leave for 16 plus years of service in PASD.

The School District shall make a non-elective employer contribution to the employee's 403(b) retirement program in this amount. The employee shall receive no cash option.

In the event of the death of an administrator, who has been employed for at least five consecutive years as a Phoenixville Area School District Administrator, while in the employment of the School District, the District will make an employer contribution to the administrator's 403(b) account according to the above schedule.

RETIREMENT BENEFITS

For administrators employed for at least five (5) consecutive years in Phoenixville Area School District, who retire under the superannuated provisions of the Public School Employee's Retirement System, (i.e., currently, 35 or more years of service at any age; 30 or more years of service at age 60; or one or more years of service at age 62, subject to change by P.S.E.R.S. or temporarily changed through "30-and-out" early retirement "windows," etc.) and begin to collect benefits, the school district shall make a non-elective employer contribution to the employee's 403(b) retirement program in the amount equal to:

- \$ 80.00 for each day of unused sick leave after completing 5-7 years of service in PASD
- \$100.00 for each day of unused sick leave after completing 8-10 years of service in PASD
- \$120.00 for each day of unused sick leave after completing 11-13 years of service in PASD
- \$130.00 for each day of unused sick leave after completing 14-15 years of service in PASD
- \$140.00 for each day of unused sick leave after completing 16 plus years of service in PASD
- \$110.00 for each year of service in PASD.
- Current daily rate for accumulated, unused vacation days.

Administrators in active service with Phoenixville Area School District as of June 30, 2007, will be "grandfathered" in above provision in that District will continue to utilize both sick days accumulated while employed in Phoenixville Area School District as well as unused sick days transferred and formally accepted from other districts and intermediate units at time of hire, as documented in administrator's personnel file and included in current sick leave balance. However, effective July 1, 2007, newly hired administrators will be able to transfer an unlimited number of unused sick days for sick leave purposes only; but only up to twenty-five (25) such days will be credited for retirement benefit purposes at time of retirement.

When an administrator uses sick leave while actively employed, the transferred sick days will be depleted first.

In the event of the death of an administrator, who is eligible for retirement, while in the employment of the School District, due compensation will be deposited into the administrator's 403(b) account.

Administrators who receive the said Retirement Benefits must meet the existing superannuated criteria established by the Pennsylvania School Employees Retirement System (PSERS) for eligibility for full retirement (i.e., retirement without penalty), including any possible future "30-and-Out Early Retirement Window" provisions that qualify as superannuation which are adopted by the Pennsylvania Legislature and signed into law by the Governor.

In order to qualify for Retirement Benefits, administrators will need to verify their retirement status with the Business Manager by providing documentation that they have begun to collect monthly superannuated benefits through PSERS.

Medical Coverage for Retirees

Active members shall continue to participate, at School District expense, in the medical insurance program, as listed below, or a comparable plan, until eligible for Medicare. Spousal coverage under medical insurance program as listed below, or under a comparable plan, may be continued at the employee's expense.

Retiring members with a minimum of ten (10) years of service to the School District shall continue to participate, at School District expense, in the administrator's medical/prescription/dental/ vision insurance programs or comparable Medicare supplement premiums for a period of three (3) years.

Retiring members with a minimum of fifteen (15) years of service to the School District shall continue to participate, at School District expense, in the administrator's medical/prescription/dental/vision insurance programs or comparable Medicare supplement premiums for a period of five (5) years.

Retiring members with a minimum of twenty (20) years of service to the School District shall continue to participate, at School District expense, in the administrator's medical/prescription/dental/vision insurance programs or comparable Medicare supplement premiums for a period of seven (7) years.

Retiring members with a minimum of twenty-five (25) years of service to the School District shall continue to participate, at School District expense, in the administrator's medical/prescription/dental/vision insurance programs or comparable Medicare supplement premiums for a period of ten (10) years.

Retiring members with a minimum of thirty (30) years and beyond of service to the School District shall continue to participate, at School District expense, in the administrator's medical/prescription/dental/vision insurance programs or comparable Medicare supplement premiums for a period of fifteen (15) years.

Once the retired administrator is eligible for Medicare coverage, the School District will contribute to the cost of Medicare supplement premiums. (This also applies to when the spouse is eligible for Medicare coverage. This spousal coverage is at the employee's expense.)

SPECIAL AGREEMENT ON INSURANCE PROGRAMS

Once Plan is adopted, the Act 93 group agrees to the coverage outlined in this document. The only exception to this provision would be if the Board and PAEA agree to a superior benefits package. In that event, the Benefits portion of this Plan will be reopened to meet and discuss concerning possible changes.

HEALTH CARE BENEFITS (EMPLOYEE 'CAFETERIA' BENEFIT PLAN)

Health care benefits (medical, dental, prescription and vision) and life insurance coverage will be administered and provided to members under terms of this Plan as part of an overall Employee 'Cafeteria' Benefit Plan (ECBP). Under the Employee 'Cafeteria' Benefit Plan (ECBP), members will have the annual option to buy-up to additional coverage or buy-down to reduced coverage in each of the benefit areas where this option is available, as outlined in Exhibit "D". Members would also have the option to selectively opt out of any or all coverage options at a percentage of their value (35%) and can apply that amount to purchase supplemental benefits offered by the district. Individual buy-up or opt-down options will remain in effect for a full fiscal year (July 1st to June 30th of each year of the Agreement) unless a member experiences a COBRA-type qualifying event (ex., death of spouse, termination of spouse's employment, etc.) which necessitates a change in coverage. Selection of annual buy-up and opt-down options will be made by individual members initially upon formal approval of Plan, and subsequently by March 1st of each year of the Plan.

Buy-up and buy-down options as outlined in Exhibit "D" may be adjusted annually through Meet and Discuss process between representatives of Board and Act 93 group, if mutual interest exists and if proposed adjustments can be agreed upon by March 1st of each year of the Plan.

LIFE INSURANCE

The School District shall provide each member with a term life insurance policy equal to twice the member's salary. (Exhibit "E.")

The School District shall provide Accidental Death and Dismemberment Insurance as follows:

Loss of life	-	Principal amount
Loss of hand, foot, or sight of eye	-	One-half principal amount
More than one of the above losses	-	Principal amount
Loss of life while fare paying passenger in a common carrier	-	Two times principal amount

Members will have the option to buy additional coverage for spouse or children. (Exhibit "E".)

MEDICAL INSURANCE

The School District shall provide the Blue Cross/Blue Shield Personal Choice Option-20 as the base health insurance plan, with the option to buy up at employee's expense to Personal Choice Option-5 or opt down to Personal Choice Option 15/25/70. (Exhibit "F".) Each administrator will contribute the amount stated below per month:

2007 – 2008 School Year:	\$35.00 per month
2008 – 2009 School Year:	\$40.00 per month
2009 – 2010 School Year:	\$45.00 per month
2010 – 2011 School Year:	\$50.00 per month

The District will pay the balance of the premium cost of "Base Plan" insurance coverage for the administrator and eligible spouse and dependents.

Unmarried, dependent children in full-time attendance at an accredited secondary school, college, or university, whose legal residence is the member's home may also be included as part of the plan up to twenty-three (23) years of age.

Upon application to and acceptance by the insurer, members may also include unmarried, dependent children, nineteen (19) years of age or older who are incapable of self-support due to physical or mental handicap prior to nineteen (19) years of age, and who are eligible for coverage as dependents prior to nineteen (19) years of age.

The health insurance coverage will be made available to the member effective upon submission of required application forms to the Business Office. The coverage will be discontinued the last day of the month in which the member's employment is terminated.

Members on sabbatical leave, approved sick leave, bereavement leave, personal or emergency leave, and/or leave for serving on jury duty shall continue all insurance with the Board paying the full cost of the premiums.

Each member shall have provided at School District expense, a full physical examination one (1) time per school year. With reasonable cause or justification, the Board may request a member of the Act 93 team to undergo a full physical and/or psychological examination at School District expense. The results of any such examination are to be provided to the Board or their designee.

All medical insurance provisions under the 2007-2011 Act 93 Plan will go into effect on July 1, 2007.

DISCRETIONARY EXPENSE FUND

Section 1 - Effective July 1, 2007, the Board of School Directors will make available each year a discretionary expense fund of \$1,800.00 per member. Monies not expended by June 30th of each fiscal year will revert to the School District. These funds may be used for:

- A. Out of Pocket Medical, Dental, Vision and Prescription Expenses
- B. Life Insurance
- C. Disability Insurance
- D. Health Maintenance Programs

Section 2 - This fund will be increased to \$2,300 for employees who opt-down Medical Insurance to Personal Choice Option 15/25/70.

Section 3 - All administrative employees will be eligible to participate to the extent allowable under the Internal Revenue Code. The employee will be responsible for any taxable portion of the benefit.

DENTAL CARE PROGRAM

Each member shall be covered by a Dental Care Program as described in Exhibit "G." The Board will pay full coverage for the member and their spouse and dependent coverage. Members have the option to buy on an annual basis to the two options listed in the Exhibit.

VISION PROGRAM

Each member and dependents shall be covered by a Vision Program as described in Exhibit "H." The Board shall pay full premiums for this program for the members and their spouse and dependents. There shall be no deductibles.

PRESCRIPTION DRUG PLAN

The Board shall provide a 100% employer-paid prescription drug program for all members and for their eligible spouse and dependents with the following co-pays:

- Ten dollars (\$10.00) generic drugs and
- Twenty dollars (\$20.00) name brand drugs
- Two dollars (\$2.00) maintenance drugs through mail order.

This plan shall include oral contraceptives.

COST CONTAINMENT PROVISION FOR OPTING OUT OF HEALTH INSURANCE

For the purpose of assisting the District in containing the costs of providing hospitalization and major medical, dental, prescription, and vision benefits to its employees and limiting the future increases in these costs, all employees who voluntarily discontinue these medical benefits (hospitalization and major medical, dental, prescription and vision) at the start of any school year shall receive a bonus payment in the amount of thirty-five percent (35%) of the annual cost of the discontinued coverage. This bonus shall be paid to the employee in a lump sum, or may be used by the employee towards the purchase of supplemental benefits; any unused portion of this bonus shall be paid to the employee. This election may be made annually. This bonus is not considered as part of the employee's base salary and will not be reported to the Pennsylvania School Employees Retirement System (PSERS) for the purpose of retirement. An employee may re-enroll within one (1) calendar year provided there has been a qualifying event (examples, reduction in hours, retirement, voluntary resignation, strike, walkout, layoff, divorce, legal separation, death of covered employee, other employment termination not related to gross misconduct, or other event in conjunction with COBRA law) and the carrier will allow such re-enrollment, and further providing the employee returns the bonus to the School District on a prorated basis. Employees who voluntarily discontinue medical benefits (as listed above), under the cost containment provisions, also will be eligible for an increase in their Discretionary Expense Fund from \$1,800 to \$2,300, subject to any IRS regulations. The employee will be responsible for any taxable portion of the benefit.

DISABILITY INCOME PROTECTION PLAN

The School District shall provide both short and long-term disability income protection plans for members. Sick leave must be exhausted prior to this benefit taking effect.

Short-term protection plan will be applied if a member is unable to work because of disability due to non-occupational accident or sickness. Weekly benefits will be paid in the amount of sixty-seven (67%) percent of basic weekly earnings to a maximum of \$2,400 dollars per week up to thirty-nine (39) weeks for any one period of disability. Benefits will begin with the thirtieth day of disability due to sickness if the member has been treated by a physician licensed to practice medicine on or before that day; otherwise benefits will begin the first day thereafter on which the member is treated by such a physician. For additional short and long-term protection information refer to Exhibit "J."

SEPARABILITY CLAUSE

In the event that any of the provisions of this Plan are declared invalid by a court of competent jurisdiction, the remaining provisions of this Plan shall continue in full force and effect.

GRIEVANCE PROCEDURE

PURPOSE

The purpose of the grievance procedure is to provide a formal means of resolving Act 93/PASDA or individual disagreements about the provisions of this Plan. The parties further agree that orderly and expeditious resolutions of grievances shall occur.

GRIEVANCE PROCEDURE (Continued)

DEFINITION

A grievance shall be defined as a written claim by an administrative employee or the PASDA based upon an alleged misinterpretation, misapplication, or violation of the terms of this Agreement relating to salaries, employee benefits, working conditions or any other written provisions included in said Plan. It also may be based upon a personal loss or injury as applies to the above, or to misinterpretation, misapplication, or violation of Board Policy as it applies to the grievant or PASDA.

TIMELINES

"Days" as used in this Article shall refer to workdays. A workday is a day when work is scheduled, excluding the day when a grievance is submitted. Between May 1 and the close of the school year, the time limits shall consist of calendar days so that the matter may be resolved before the close of the school year or as soon thereafter as possible.

PROCEDURE

1. If at all possible, a grievance should be resolved at the lowest administrative level (i.e., with the direct supervisor).
2. During, and notwithstanding the pendency of any grievance, it is understood that employees shall continue to observe all assignments, applicable rules and regulations of the School District and directions of their direct supervisor until such grievance shall be resolved.
3. Any individual employee or group of employees shall have the right to present grievances and to have them adjusted without the intervention of PASDA as long as:
 - a. The adjustment is consistent with the terms of this Plan, or successor Plans.
 - b. PASDA has been given an opportunity to be present and heard at each step of the proceedings.
 - c. Individual employee has been given an opportunity to be present and heard and receive PASDA representation at each step of the proceedings.

LINE OF GRIEVANCE

The line of grievance shall proceed as follows:

STEP I

An employee with a grievance shall submit it first to his/her direct supervisor in an attempt to resolve it formally at that level. The direct supervisor shall schedule a meeting with the grievant and/or his/her representative (i.e. fellow member of PASDA not party to the dispute in question) to be held within five (5) days' notification to him/her by the grievant and/or his/her representative that a grievance is being presented. If the, direct supervisor, does not schedule a meeting in good faith, or fails to render a decision within three (3) days after the meeting, the grievance may proceed to Step II.

Step II

If the action in Step I fails to resolve the grievance to the satisfaction of the grievant, or if the Step I administrator fails to hold a hearing or render a timely decision in good faith, the grievant may request a hearing of the grievance by the Superintendent or his designee. The appeal shall be made on the appropriate form (to be developed within 60 days after approval of Agreement). The basis for the employee's or PASDA's continued dissatisfaction shall be specifically delineated. Such appeal must be made within five (5) days after receipt of the decision at Step II.

GRIEVANCE PROCEDURE (Continued)

The Superintendent, or Superintendent's designee, shall set a hearing date, which shall be within five (5) days of the receipt of the grievant's or PASDA's written request for a hearing, and notice shall also be sent to PASDA. The Superintendent, or designee, shall render a decision in writing within five (5) days after the hearing and shall communicate his/her decision to the grievant and PASDA. If the Act 93 member reports directly to the Superintendent, proceed to Step III.

Step III

If the decision at Step II fails to resolve the grievance, there will be a Board-level hearing. The Board or the Board's designee, shall set a hearing date, which shall be within ten (10) days of the receipt of the grievant's or PASDA's written request for a hearing, and notice shall be sent to PASDA. The Board or designee shall render a decision in writing within five (5) days after the hearing and shall communicate the decision to the grievant and PASDA.

Step IV

If the decision at Step III fails to resolve the grievance, or if the Board in Step III fails to hold a hearing or render a timely decision in good faith, the grievance may be submitted to binding arbitration. The grievant and/or PASDA shall advise the Superintendent, within ten (10) days after receiving his decision, of his/her/their desire to proceed to arbitration, and a joint request by the parties shall state in reasonable detail the nature of the dispute and remedy requested, shall be forwarded to the proper agencies according to the Pennsylvania Public Employee Relations Act.

Costs of Arbitration

The costs of arbitration shall be borne by the Board and the grievant or grievant's professional association (if grievant has such coverage). Any other expenses incurred shall be paid by the party incurring the same.

The arbitrator appointed under the procedures set forth herein shall rule upon the question of arbitrability prior to hearing the merits of the dispute in question. If the arbitrator rules that the dispute is subject to arbitration, and if both parties are prepared to present their cases, then the arbitrator shall proceed to hear the dispute on its merits. If either party is unprepared to proceed after the issue of arbitrability is decided, the arbitrator shall promptly schedule a second meeting to hear the dispute based on its merits.

Arbitration Procedure

The arbitrator selected shall confer with the representatives of the Board and PASDA and hold hearings promptly. He/She shall issue his/her ruling no later than thirty (30) days from the date of the close of the hearings, or, if oral hearings have been waived, then from the date the final statements and proof on the issues are submitted to him/her. The arbitrator's recommendation shall be made in writing and shall set forth his/her findings of fact, reasoning and conclusions. The arbitrator shall confine his/her opinion to the particular issue(s) submitted to him/her.

Governing Provisions

1. A grievance to be considered under this procedure must be initiated by the employee, or PASDA, within sixty (60) days of its occurrence or within sixty (60) days after the employee would reasonably be expected to know of its occurrence. However, failure to grieve in one case shall under no circumstances be construed as forfeiting the right to grieve in similar cases at some later date.

GRIEVANCE PROCEDURE (continued)

Governing Provisions (continued)

2. If the grievant in writing does not choose to be accompanied and represented by a PASDA representative, PASDA shall have the right to be present and to state its views at all levels of the grievance procedure, regardless of wishes of grievant.
3. The employee must and should be present at any level of the grievance procedure, where his/her grievance is to be discussed.
4. Hearings at any level of the grievance procedure may be waived only by mutual agreement of both parties.
5. A grievance when presented at Step II, and thereafter, shall be in writing, in duplicate, and shall specify:
 - a. the nature of the grievance;
 - b. the Agreement Article or Section or the Policy number and section which was allegedly misinterpreted, misapplied or violated;
 - c. the nature of the personal loss or injury;
 - d. the specific remedy sought; and
 - e. after Step I, the basis for the dissatisfaction with the decision previously rendered.
6. Failure at any step of this procedure to appeal a grievance to the next step within the specific time limits shall be deemed to be acceptance of the decision rendered at that step. At all steps, the number of days indicated shall be considered as maximum. However, the time limits may be extended by mutual agreement in writing.
7. Failure to appear at a scheduled hearing shall constitute abandonment of the grievance, provided that adequate notice has been given the grievant(s) and PASDA of such scheduled hearings, and further provided that if emergencies arise, shall be rescheduled.
8. Should any decision of the Pennsylvania Labor Relations Board, or any court of competent jurisdiction within the Commonwealth, determine that any provision of this grievance is contrary to the provisions and intent of the Public Employees Relations Act or the Pennsylvania School Code, then in such case the provisions set forth in the grievance procedure shall be construed as to conform to such decision.
9. At the Superintendent's request, PASDA shall provide him/her with a copy of the individual's or group of individuals' written authorization that PASDA grieves for him/her/them.
10. By mutual agreement of the parties, a set of forms to be used in Step II and III of this Article shall be prepared by the Director of Human Resources within 60-days of the approval of the Act 93 Agreement.
11. The Board and PASDA may meet during the 2007-2011 school years to update other ways of handling grievances.

ADMINISTRATIVE PERFORMANCE EVALUATION PLAN

INTRODUCTION

It is the intention of the Phoenixville Board of School Directors to compensate administrators at a level that will attract and retain people with superior administrative and supervisory abilities. Therefore, it is essential that the compensation plan utilized by the School District be directly related to evaluation, annual review and update, and useful in promoting professional development. The program of evaluation shall be the responsibility of the Superintendent. Any new hire would have gone through an evaluation during the interview process and it will be the intent of the School Board to hire that individual at or near the 75th percentile in Chester County, Pennsylvania.

PURPOSE

The purpose of the evaluation process is to provide opportunities for the supervisor and supervisee to discuss and insure a clear understanding of normal job duties and responsibilities, and to assess the supervisee's goals. The evaluation process provides for more meetings at the request of either the supervisor or supervisee.

PROCEDURES FOR THE PERFORMANCE EVALUATION OF ADMINISTRATORS

Evaluation – An annual evaluation and a mid year review will be given by the immediate supervisor to whom an administrator reports (per organizational chart). The evaluation of Act 93 administrators shall be based upon the performance of regular job duties and responsibilities and the achievement of annual goals. The evaluation will be presented to the employee by May 31 of each year.

EVALUATION PROCESS

ANNUAL GOALS
ESTABLISHED IN FALL
WITH SUPERVISOR

DUTIES AND
RESPONSIBILITIES
AS DEFINED IN THE JOB
DESCRIPTION

MID-YEAR REVIEW

MID-YEAR REVIEW

OTHER REVIEWS
AS NEEDED OR AS
NECESSITATED BY
IMPROVEMENT PLANS

CONFERENCE ON
ACHIEVEMENT OF
GOALS AND
ACCOMPLISHMENT OF
DUTIES AND
RESPONSIBILITIES

FINAL EVALUATION
REVIEW OF PROGRESS
IN MAY

OVERALL EVALUATION
AND SALARY
EVALUATION

ADMINISTRATIVE PERFORMANCE EVALUATION PLAN (Continued)

EVALUATION RATINGS

- A. **EXCELLENT** - Performs the regular duties and responsibilities of the position and annual goals far beyond expectations as shown by improvement in areas like work methods, supervision, decision-making, and interpersonal relationships.
- B. **VERY GOOD** – Performs the regular duties and responsibilities of the position and achieves annual goals beyond expectations as shown by effectiveness in areas like work methods, supervision, decision-making and interpersonal relationships.
- C. **GOOD** – Performs the regular duties and responsibilities of the position and may achieve annual goals as shown by actions in areas like work methods, supervision, decision-making, and interpersonal relationships.
- D. **AVERAGE** – Is considered average in the performance of regular duties and responsibilities of the position and may achieve annual goals.
- E. **UNSATISFACTORY** – Does not adequately perform the regular duties and responsibilities of the position or achieve annual goals.

RATING GUIDE

RATING	SCORE
Excellent	5
Very Good	4
Good	3
Average	2
Unsatisfactory	1
Not Applicable	N/A *

*A N/A negates a category thus changing the divisor. Only categories receiving a numerical score will count in the divisor in the calculation of the performance evaluation rating average. The average of the scores will translate into an overall rating and determine the employees performance increase.

A Score of 4.5 or greater is translated as an EXCELLENT rating and a 3% performance increase.

A Score of 3.5 – 4.49 is translated as a VERY GOOD rating and a 2% performance increase.

A Score of 2.5 – 3.49 is translated as a GOOD rating and a 1% performance increase.

A Score of 1.5 – 2.49 is translated as an AVERAGE rating and there is no performance increase.

A Score below 1.5 is translated as an UNSATISFACTORY rating and there is no performance increase.

ADMINISTRATIVE PERFORMANCE EVALUATION PLAN (Continued)

PERFORMANCE EVALUATION FACTORS

The criteria for the evaluation of Act 93 administrators are the following sub-headings. Based upon a review of the particular function of the job description and its applicability to the particular criteria, the supervisor will, at the first conference, outline the criteria of performance and determine the applicable section of the supervisee's job description. If at any time, it is determined by the immediate supervisor of an Act 93 administrator that the Act 93 administrator fails to display any of the following Performance Evaluation Factors, then it is the responsibility of the supervisor to notify the Act 93 administrator within a reasonable time. Further, the immediate supervisor should provide an improvement plan to include strategies and a timeline for improvement. Areas of consideration in performance are:

- A. **Leadership** – to motivate, influence and direct others to become more effective and efficient employees whom are committed to excellence:
 - Demonstrates initiative and perseverance
 - Supervises and trains staff
 - Promotes the development and implementation of curricula and instructional strategies
 - Plans programs
 - Keeps current with trends and methods
 - Demonstrates self-control
 - Promotes morale and motivation
 - Commands attention and respect

- B. **Decision-making** – to exhibit sound judgment (the ability to think clearly and to arrive at logical, meaningful conclusions) and presence of mind (the ability to think and act reasonably promptly and effectively in unexpected emergencies or under great strain):
 - Uses good judgment; maintains presence of mind
 - Approaches problems rationally, gathers data, and considers alternatives
 - Communicates decisions clearly and on a timely basis
 - Seeks support of staff, parents, and community, as needed
 - Delegates effectively and appropriately
 - Establishes well-defined work objectives and priorities
 - Responds appropriately and efficiently under pressure and in emergency situations
 - Accepts responsibility for own actions and subordinates' actions

- C. **Communication Ability** – to transmit information accurately and effectively in written or verbal form for the purpose of accomplishing the intended outcomes of the position:
 - Demonstrates knowledge of public relations
 - Identifies problems and concerns; acts on problems and concerns
 - Identifies and utilizes community resources
 - Demonstrates effective speaking and writing skills
 - Respects confidentiality
 - Listens to staff, peers, community, students, and Board; acts based on information gathered
 - Makes persuasive, clear presentation of facts and ideas
 - Writes in a professional and concise manner

ADMINISTRATIVE PERFORMANCE EVALUATION PLAN (Continued)

PERFORMANCE EVALUATION FACTORS (Continued)

- D. **Administrative Duties** – the ability to plan, conduct, and manage in an orderly sequence the achievement of the goals and objectives of the building/area of responsibility within the policies and philosophy of the School District:
- Attentive to job
 - Loyal to School District
 - Maintains appropriate records and other information
 - Corresponds appropriately and in a timely manner
 - Develops and evaluates methods and procedures
 - Utilizes own time and staff time effectively
 - Makes proper use of staff evaluation
 - Seeks staff input
 - Decides fairly, firmly, and impartially
 - Acts without personal bias
 - Observes administrative regulations and Board policies; makes recommendations for change in appropriate ways
 - Initiates and participates in staff development
 - Maintains appropriate programs of safety and security of people and property
- E. **Interpersonal Relations** – the ability to relate to and interact with others and with groups while considering the feelings, needs and concerns of these individuals and groups while promoting the mission of the School District:
- Cooperates
 - Fosters and maintains school and community relations
 - Demonstrates ability to work with community groups
 - Demonstrates ability to work with students, parents, staff, and Board
 - Is able to present positively the School District and school programs to the various publics
- F. **Professional Growth** – to maintain and improve an awareness and understanding of the current theory, research, trends, principles, and terminology utilized in the performance of the responsibilities of the position:
- Joins professional organizations
 - Serves and/or cooperates with service organizations
 - Continues to be an active learner
 - Reads widely by keeping current with trends and methods
 - Promotes internal education programs/in-service
- G. **Fiscal Management** – to understand and to implement prudent and efficient practices related to the expenditures of School District funds:
- Controls budget responsibly
 - Develops budget responsibly
 - Demonstrates concern for fiscal responsibility
 - Takes positive action to reduce the use of resources

ADMINISTRATIVE PERFORMANCE EVALUATION PLAN (Continued)

PERFORMANCE EVALUATION FACTORS (Continued)

- H. **Building/Facility Responsibilities** – to maintain and to preserve the School District's facilities and properties and to initiate creative and effective procedures to maximize their efficient use:
- Develops methods, procedures, and suggestions for more efficient use of equipment and buildings
 - Assists preventive maintenance program by promptly reporting problem areas
 - Oversees the maintenance of equipment and the efficient use of equipment and buildings
2. **Annual Goals**
- To be developed by the employee, reviewed by and agreed upon by the supervisor.

ADMINISTRATIVE PERFORMANCE EVALUATION FORM

Section A - Personal Data

Name _____

Title/Department _____

Report Period _____

Section B - Performance Evaluation

	Numerical Score (1-5)
Leadership	
Decision-making	
Communication Ability	
Administrative Duties	
Interpersonal Relations	
Professional Growth	
Fiscal Management	
Building/Facility Responsibilities	
Achievement of Annual Goals	

Total Score

Average

Overall Evaluation: Has this person received commendations or recommendations during this report period? If so, attach copy of reference in Section C.

Check yes or no in both categories:

Commendations - Yes
 - No

Recommendations - Yes
 - No

Section C - Narrative Appraisal of Administrator's Evaluation (may attach document)

Section D - Administrative Signatures

To the best of my knowledge and belief, all entries made hereon are true and without prejudice or partiality. I have conferenced the supervisee concerning his/her overall performance

Supervisor's Signature _____ Date _____

I have read this complete report: - added no statement - have attachment statement

Supervisee's Signature _____ Date _____

PHOENIXVILLE AREA SCHOOL DISTRICT

PERFORMANCE EVALUATION FOR ADMINISTRATIVE ASSISTANTS

Employee Name: _____ School Year: _____

Position Title: _____

I. Attitude – approach to job responsibilities

- | | | | | | | | |
|---|----|---|---|---|---|---|----|
| 1. Uses good communication skills with Phoenixville personnel, students, and public | 1. | 5 | 4 | 3 | 2 | 1 | NA |
| 2. Performs duties in a positive and courteous manner. | 2. | 5 | 4 | 3 | 2 | 1 | NA |
| 3. Is able to take constructive criticism. | 3. | 5 | 4 | 3 | 2 | 1 | NA |
| 4. Presents positive image of Phoenixville Area School District. | 4. | 5 | 4 | 3 | 2 | 1 | NA |
| 5. Uses time effectively. | 5. | 5 | 4 | 3 | 2 | 1 | NA |
| 6. Demonstrates initiative. Use own resources before asking questions. | 6. | 5 | 4 | 3 | 2 | 1 | NA |
| 7. Exhibits loyalty for all levels of the organization. | 7. | 5 | 4 | 3 | 2 | 1 | NA |

II Cooperation – willingness to work with other employees to meet established goals

- | | | | | | | | |
|---|----|---|---|---|---|---|----|
| 1. Follows established worksite procedures. | 1. | 5 | 4 | 3 | 2 | 1 | NA |
| 2. Willingly assists other employees as needed. | 2. | 5 | 4 | 3 | 2 | 1 | NA |
| 3. Adapts to change. | 3. | 5 | 4 | 3 | 2 | 1 | NA |
| 4. Shows a positive attitude. | 4. | 5 | 4 | 3 | 2 | 1 | NA |

III. Dependability – willingness to accept responsibilities associated with position

- | | | | | | | | |
|---|----|---|---|---|---|---|----|
| 1. Completes assigned jobs. | 1. | 5 | 4 | 3 | 2 | 1 | NA |
| 2. Meets deadlines. | 2. | 5 | 4 | 3 | 2 | 1 | NA |
| 3. Adheres to work hours established for position. | 3. | 5 | 4 | 3 | 2 | 1 | NA |
| 4. Demonstrates self-reliance. Performs and follows through on duties without direct supervision. | 4. | 5 | 4 | 3 | 2 | 1 | NA |
| 5. Uses judgment. Knows when to act, when to consult before acting, and when to recommend action. | 5. | 5 | 4 | 3 | 2 | 1 | NA |
| 6. Treats confidential matters appropriately. | 6. | 5 | 4 | 3 | 2 | 1 | NA |

IV. Quality – level of job performance

- | | | | | | | | |
|---|----|---|---|---|---|---|----|
| 1. Works accurately. | 1. | 5 | 4 | 3 | 2 | 1 | NA |
| 2. Works neatly. | 2. | 5 | 4 | 3 | 2 | 1 | NA |
| 3. Demonstrates organizational skills and technical skills. | 3. | 5 | 4 | 3 | 2 | 1 | NA |
| 4. Plans effectively to meet timelines. | 4. | 5 | 4 | 3 | 2 | 1 | NA |
| 5. Performs assigned tasks in an efficient manner. | 5. | 5 | 4 | 3 | 2 | 1 | NA |
| 6. Benefits from experience and able to adjust. | 6. | 5 | 4 | 3 | 2 | 1 | NA |
| 7. Appropriately uses equipment and/or technology. | 7. | 5 | 4 | 3 | 2 | 1 | NA |

V. Overall Evaluation (All Factors Considered) – Total Score _____ Average Score _____

Rating Scale: 5=Excellent, 4=Very Good, 3=Good, 2=Average, 1=Unsatisfactory, N/A

Percentage Increase: _____

4.5 or greater = 3%, 3.5 – 4.49 = 2%, 2.5 – 3.49 = 1%, 2.49 and below = 0%

I acknowledge that I have reviewed this evaluation and that I was afforded the opportunity to discuss the contents of this report with the evaluator. My signature does not necessarily mean that I agree with the evaluation of my performance.

Employee Signature: _____ Date: _____

Reviewers' Signature: _____ Date: _____

PHOENIXVILLE AREA SCHOOL DISTRICT
Performance Evaluation for Administrative Assistants

Employee Name: _____

SUPERVISOR:

Substantiate your rating by noting specific instances of good or inadequate performance by the employee that have occurred during this work period.

State any specific actions which have been or should be taken to improve the employee's performance.

Additional comments.

EMPLOYEE:

Do you feel that this review has been fair and accurate?

In what ways do you feel your work can be improved?

Signature of Employee

Signature of Supervisor

PHOENIXVILLE AREA SCHOOL DISTRICT
PERFORMANCE EVALUATION FOR NON SUPERVISORY, SALARIED EMPLOYEES

Employee Name: _____ School Year: _____

Position Title: _____

I. Attitude - approach to job responsibilities

- | | | | | | | | |
|---|----|---|---|---|---|---|----|
| 1. Uses good communication skills with Phoenixville personnel, students, and public | 1. | 5 | 4 | 3 | 2 | 1 | NA |
| 2. Performs duties in a positive and courteous manner. | 2. | 5 | 4 | 3 | 2 | 1 | NA |
| 3. Is able to take constructive criticism. | 3. | 5 | 4 | 3 | 2 | 1 | NA |
| 4. Presents positive image of Phoenixville Area School District. | 4. | 5 | 4 | 3 | 2 | 1 | NA |
| 5. Uses time effectively. | 5. | 5 | 4 | 3 | 2 | 1 | NA |
| 6. Demonstrates initiative. Use own resources before asking questions. | 6. | 5 | 4 | 3 | 2 | 1 | NA |
| 7. Exhibits loyalty for all levels of the organization. | 7. | 5 | 4 | 3 | 2 | 1 | NA |

II Cooperation - willingness to work with other employees to meet established goals

- | | | | | | | | |
|---|----|---|---|---|---|---|----|
| 1. Follows established worksite procedures. | 1. | 5 | 4 | 3 | 2 | 1 | NA |
| 2. Willingly assists other employees as needed. | 2. | 5 | 4 | 3 | 2 | 1 | NA |
| 3. Adapts to change. | 3. | 5 | 4 | 3 | 2 | 1 | NA |
| 4. Shows a positive attitude. | 4. | 5 | 4 | 3 | 2 | 1 | NA |

III. Dependability - willingness to accept responsibilities associated with position

- | | | | | | | | |
|---|----|---|---|---|---|---|----|
| 1. Completes assigned jobs. | 1. | 5 | 4 | 3 | 2 | 1 | NA |
| 2. Meets deadlines. | 2. | 5 | 4 | 3 | 2 | 1 | NA |
| 3. Adheres to work hours established for position. | 3. | 5 | 4 | 3 | 2 | 1 | NA |
| 4. Demonstrates self-reliance. Performs and follows through on duties without direct supervision. | 4. | 5 | 4 | 3 | 2 | 1 | NA |
| 5. Uses judgment. Knows when to act, when to consult before acting, and when to recommend action. | 5. | 5 | 4 | 3 | 2 | 1 | NA |
| 6. Treats confidential matters appropriately. | 6. | 5 | 4 | 3 | 2 | 1 | NA |

IV. Quality - level of job performance

- | | | | | | | | |
|---|----|---|---|---|---|---|----|
| 1. Works accurately. | 1. | 5 | 4 | 3 | 2 | 1 | NA |
| 2. Works neatly. | 2. | 5 | 4 | 3 | 2 | 1 | NA |
| 3. Demonstrates organizational skills and technical skills. | 3. | 5 | 4 | 3 | 2 | 1 | NA |
| 4. Plans effectively to meet timelines. | 4. | 5 | 4 | 3 | 2 | 1 | NA |
| 5. Performs assigned tasks in an efficient manner. | 5. | 5 | 4 | 3 | 2 | 1 | NA |
| 6. Benefits from experience and able to adjust. | 6. | 5 | 4 | 3 | 2 | 1 | NA |
| 7. Appropriately uses equipment and/or technology. | 7. | 5 | 4 | 3 | 2 | 1 | NA |

V. Overall Evaluation (All Factors Considered) – Total Score _____ Average Score _____

Rating Scale: 5=Excellent, 4=Very Good, 3=Good, 2=Average, 1=Unsatisfactory, N/A

Percentage Increase: _____

4.5 or greater = 3%, 3.5 – 4.49 = 2%, 2.5 – 3.49 = 1%, 2.49 and below =0%

I acknowledge that I have reviewed this evaluation and that I was afforded the opportunity to discuss the contents of this report with the evaluator. My signature does not necessarily mean that I agree with the evaluation of my performance.

Employee Signature: _____ Date: _____

Reviewers' Signature: _____ Date: _____

PHOENIXVILLE AREA SCHOOL DISTRICT
Performance Evaluation for Non Supervisory, Salaried Employees

Employee Name: _____

SUPERVISOR:

Substantiate your rating by noting specific instances of good or inadequate performance by the employee that have occurred during this work period.

State any specific actions which have been or should be taken to improve the employee's performance.

Additional comments.

EMPLOYEE:

Do you feel that this review has been fair and accurate?

In what ways do you feel your work can be improved?

Signature of Employee

Signature of Supervisor

EXHIBIT "A"

POSITION TITLES FOR JOB DESCRIPTIONS

Director of Pupil Personnel Services
High School Principal
Middle School Principal
Elementary School Principal
Kindergarten Center Principal
Assistant High School Principal
Assistant Middle School Principal
Director of Technology
Director of Operations
Curriculum Supervisors
Supervisor of Special Education
Comptroller
Director of Student Athletics and Activities
Assistant Elementary School Principal
Supervisor of Maintenance and Custodial Services
Supervisor of Technology Operations
Child Accounting/ACCESS Coordinator
Administrative Assistant to the Superintendent of Schools
Administrative Assistant to the Assistant Superintendent for Curriculum
Administrative Assistant to the Director of Human Resources
Employee Benefits Administrator
Community Relations Coordinator
Energy Manager/Educator
Athletic Specialist
Community Outreach/Student Behavior Supervisor
Director of School Community Relations

EXHIBIT "B"

SALARY PLAN INTERPRETATION

1. Members of the Act 93 agreement will receive an annual cost of living increase and a performance increase based on the employees performance evaluation. Performance increases will be based upon the following performance evaluation score:

- a. $0.00 - 2.49 = 0\%$
- b. $2.50 - 3.49 = 1\%$
- c. $3.50 - 4.49 = 2\%$
- d. $4.50 - 5.00 = 3\%$

2. Example:

\$100,000	Actual Salary
\$100,000	Base Salary
\$ 3,000	COL Increase
	Market Place Adjustment
\$103,000	Base for Next Year (base +COL+MPA)
\$ 3,000	Performance – 3%
\$106,000	Actual Salary (last year's actual + COL + MPA + Performance)
\$106,000	Actual Salary
\$103,000	Base Salary
\$ 3,090	COL Increase
	Market Place Adjustment
\$106,090	Base for Next Year (base +COL+MPA)
\$ 3,090	Performance – 3%
\$112,180	Actual Salary (last year's actual + COL + MPA + Performance)

*NOTE: Cost of Living Increase (COL) will be based on Consumer Price Index (CPI) for Urban Consumers in the Philadelphia Metropolitan Area (PA-DE-NJ-DM), as calculated and disseminated bi-monthly by the Philadelphia Regional Office of the U.S. Department of Labor. CPI increase/decrease during the previous twelve (12) months, as disseminated in April of the fiscal year will serve as the benchmark for COL.

Website: http://stats.bls.gov/ro3/fax_9145.htm

PHOENIXVILLE AREA SCHOOL DISTRICT

SECTION: ADMINISTRATIVE
EMPLOYEES

TITLE: SABBATICAL LEAVE FOR
RESTORATION OF HEALTH

ADOPTED: November 15, 2001

REVISED: February 20, 2003

	338. SABBATICAL LEAVE FOR RESTORATION OF HEALTH
1. Purpose	This policy shall establish the district's parameters for granting sabbatical leaves for restoration of health for eligible administrative employees.
2. Authority SC 1166	The Board shall grant sabbatical leaves to administrative employees for the purposes of restoration of health.
SC 1171	The Board reserves the right to specify the conditions under which sabbatical leaves for restoration of health may be taken, consistent with law.
3. Guidelines	<u>Eligibility</u>
SC 1166	To be eligible for sabbatical leave, an administrator shall have completed ten (10) years of satisfactory service in the public schools of the Commonwealth; at least five (5) consecutive years of such service shall be in this school district.
SC 1166	A sabbatical leave may be taken for a half or full school term or for two (2) half school terms during a period of two (2) years, at the option of the administrator.
	<u>Application</u> Requests for sabbatical leave shall be submitted on the approved district form and forwarded with medical documentation to the Superintendent as soon as possible. The Board shall review each application for sabbatical leave and shall approve those meeting the requirements of adopted policy.
HIPAA Act (1996)	<u>Documentation</u> An applicant for sabbatical leave shall submit with the application form an official, supporting medical statement and recommendation from his/her physician. Supporting medical statement will be kept in strictest confidence.

338. SABBATICAL LEAVE FOR RESTORATION OF HEALTH - Pg. 2

SC 1171 HIPAA Act (1996)	At both the approximate midpoint of the leave and at least thirty (30) days prior to the conclusion of the leave, the district may request a physician's statement to the Superintendent, indicating the extent to which the purpose of the leave has been achieved and evaluating the health status of the administrator relative to his/her ability to return to employment. Said statements will be kept in the strictest confidence.
HIPAA Act (1996)	The Board reserves the right to require at its own expense additional examinations and reports by physicians of its choice to determine the validity of the leave request. Said reports will be kept in the strictest confidence.
SC 1168	<u>Commitment of Administrator</u> Acceptance of a sabbatical leave incurs a commitment by the administrator to return to active duty in this district immediately following the sabbatical leave for one (1) full school year, unless physically or mentally unable to do so. The Board reserves the right to require at its own expense additional examinations and reports by physicians of its choice to determine the administrator's ability to return to work. Compensable employment may not be engaged in while the administrator is on sabbatical leave for restoration of health.
SC 1168	<u>Commitment of Employer</u> At the expiration of the sabbatical leave, the administrator shall, unless agreed otherwise, be reinstated in the same position held at the time of the granting of the leave.
SC 522.1, 1170	Time on sabbatical leave shall be counted as time on the job for purposes of seniority, where applicable in the district, and for retirement fund purposes.
SC 1169	<u>Compensation</u> During the period of sabbatical leave, an administrator shall be compensated at one-half the salary to which s/he would have been entitled had the employee not taken leave. <u>Administrative Compensation (Act 93) Plan</u> A currently valid Administrative Compensation (Act 93) Plan for administrative employees may supersede this policy.

SABBATICAL LEAVE AGREEMENT

I, _____, have applied for a Sabbatical Leave for the reason(s) of _____ from my position with the Phoenixville Area School District. I have fully reviewed the provisions of the Sabbatical Leave Policy No. 338 of the Phoenixville Area School District, and hereby agree that if the requested Sabbatical Leave is granted to me, I will comply with all of the conditions stated in this policy. I further agree that if the Sabbatical Leave is granted to me, I will return to my employment with the Phoenixville Area School District for a period of not less than one full school term immediately following the completion of such leave. In the event that I should fail to return to my employment with the school district, I agree to reimburse the school district the full amounts paid to me during the leave for salary and fringe benefits.

Executed this _____ day of _____ 20____, intending to be legally bound hereby.

Signature

Witness:

DISTRICT SUPERINTENDENT
PHOENIXVILLE AREA SCHOOL DISTRICT

PHOENIXVILLE AREA SCHOOL DISTRICT

SECTION: ADMINISTRATIVE EMPLOYEES
TITLE: SABBATICAL LEAVE FOR
PROFESSIONAL DEVELOPMENT/
COMPENSATED PROFESSIONAL
LEAVES

ADOPTED: November 15, 2001

REVISED: February 20, 2003

338.1. SABBATICAL LEAVE FOR PROFESSIONAL DEVELOPMENT/COMPENSATED PROFESSIONAL LEAVES	
1. Purpose	This policy shall establish the district's parameters for granting sabbatical leave for professional development and occupational exchange leaves for eligible administrative employees.
2. Definitions SC 1166.1	Sabbatical leave for professional development shall be defined as a leave of absence granted for the purpose of improving administrative competency or completing coursework ultimately leading to an administrative certificate or commission. Such leave shall be directly related to an administrator's professional responsibilities, as determined by the Superintendent of Schools, and be restricted to activities required by state regulation or law or to improve administrative competency.
SC 522.2	Occupational exchange leave shall be defined as a leave of absence granted for the purpose of acquiring practical work experience in business, industry or government.
3. Authority SC 1166.1, 1171	The Board shall have sole authority to adopt and enforce policy establishing the conditions for approval of a professional development leave. All requests for such leave shall be subject to review by the Board. The Board may approve or reject a proposed plan for professional development leave.
SC 522.2	The Board may grant a leave to eligible administrators for occupational exchange leave for the specified purpose.
4. Guidelines	SABBATICAL LEAVE FOR PROFESSIONAL DEVELOPMENT
	<u>Eligibility</u>
SC 1166	To be eligible for professional development leave, an administrator shall have completed ten (10) years of satisfactory service in the public schools of the Commonwealth; at least five (5) consecutive years of such service shall be in this school district.

338.1. SABBATICAL LEAVE FOR PROFESSIONAL
DEVELOPMENT/COMPENSATED PROFESSIONAL LEAVES - Pg. 2

SC 1166	A sabbatical leave for professional development may be taken for a half or full school term or for two (2) half school terms during a period of two (2) years, at the option of the administrator. <u>Application</u>
SC 1166.1	Professional development leaves shall be granted only to administrators participating in an academic program ultimately designed to serve the purpose of retaining an administrative certificate or commission, further preparation and improvement in his/her area(s) of administrative certification, additional certification, attaining other appropriate and identifiable administrative positions within the school district, or as the Board may require, and upon the recommendation of the Superintendent. Requests for professional development leave shall be submitted on the approved district form and forwarded with a detailed plan to the Superintendent. All required application materials shall be submitted by April 1 for the following school year and by October 1 for the following semester. <u>Documentation</u>
SC 1166.1	Applicants for professional development leave shall submit with the application form a detailed plan describing the professional development activities to be undertaken and a statement specifying the benefits of the leave to the administrator and the school district. The plan shall provide sufficient information to permit the Board to adequately evaluate the request. The Board may at any time require additional information from the administrator in order to assist the Board in evaluating the request and the leave's benefits to and impact on the administrator and the school district.
SC 1166.1	The minimum requirements for leave for a half school term shall consist of any of the following or a combination thereof: nine (9) graduate credits, twelve (12) undergraduate credits, one hundred eighty (180) hours of professional development activities. The minimum requirements for leave for a full school term shall be any of the following or a combination thereof: eighteen (18) graduate credits, twenty-four (24) undergraduate credits, three hundred sixty (360) hours of professional development activities. Applicants who propose to take graduate or undergraduate credits shall submit notification of acceptance and enrollment from an accredited institution of higher learning for study in courses approved by the Superintendent. The administrator shall successfully complete the approved courses and receive passing grades. Upon

338.1. SABBATICAL LEAVE FOR PROFESSIONAL
DEVELOPMENT/COMPENSATED PROFESSIONAL LEAVES - Pg. 3

	return from professional development leave, the administrator shall submit to the Superintendent within the first month an official transcript of all courses completed. Failure to receive passing grades or to submit required transcripts on time shall result in forfeiture of monies paid by the district. Applicants who propose to undertake professional development activities shall submit to the Board a detailed plan listing the specific activities. Upon return from professional development leave, the administrator shall submit to the Superintendent within the first month a formal report describing the educational activities pursued and the benefits and relevancy. Failure to submit required reports on time shall result in forfeiture of monies paid by the district. <u>Commitment of Administrator</u>
SC 1166.1, 1168	Acceptance of professional development leave incurs a commitment by the administrator to return to active duty in this district immediately following the leave for three (3) years, unless prevented by illness or disability. Administrators shall submit required reports on time or forfeit all compensation and benefits.
HIPAA Act (1996)	The Board reserves the right to require at its own expense additional examinations and reports by physicians of its own choice to determine the employee's ability to return to work. Such reports will be kept in strictest confidence. Compensable employment, aside from part-time employment already held by the administrator prior to the beginning of leave (ex., coaching) may not be engaged in while the administrator is on professional development leave. <u>Commitment of Employer</u>
SC 1168	At the expiration of the professional development leave, the administrator shall, unless agreed otherwise, be reinstated in the same position held at the time of the granting of the leave.
SC 522.1, 1170	Time on professional development leave shall be counted as time on the job for purposes of seniority, where applicable in the district, and for retirement fund purposes. <u>Compensation</u>
SC 1169	During the period of professional development leave, an administrator shall be compensated at one-half the salary to which s/he would have been entitled had the employee not taken leave.

338.1. SABBATICAL LEAVE FOR PROFESSIONAL
DEVELOPMENT/COMPENSATED PROFESSIONAL LEAVES - Pg. 4

OCCUPATIONAL EXCHANGE LEAVE

Application

Requests for occupational exchange leave shall be submitted on the approved district form and forwarded with appropriate documentation to the Superintendent.

All required application materials shall be submitted by April 1 for the following school year.

Documentation

Applicants for occupational exchange leave shall submit with the application form a statement from the proposed exchange employer agreeing to the terms and conditions of the leave, as specified in Board policy.

SC 522.2, 1166.1

Upon return from such leave, the administrator shall submit to the Board a final report detailing the work experience and its benefits.

Commitment of Administrator

SC 1168

Acceptance of occupational exchange leave incurs a commitment by the administrator to return to active duty in this district immediately following the leave for three (3) years, unless prevented by illness or disability.

HIPAA Act
(1996)

The Board reserves the right to require at its own expense additional examinations and reports by physicians of its own choice to determine the employee's ability to return to work. Such reports will be kept in strictest confidence.

Commitment of Employer

SC 1168

At the expiration of the occupational exchange leave, the administrator shall, unless agreed otherwise, be reinstated in the same position held at the time of the granting of the leave.

SC 522.2

Time on occupational exchange leave shall be counted as time on the job for purposes of seniority, where applicable in the district, and for retirement fund purposes.

338.1. SABBATICAL LEAVE FOR PROFESSIONAL
DEVELOPMENT/COMPENSATED PROFESSIONAL LEAVES - Pg. 5

SC 522.2	<u>Compensation</u> The business, industry or government entity to whom the administrator is assigned during the leave shall fully reimburse the school district for all salary, wages, pension and retirement contributions, and other benefits as if the administrator were in full-time active service. <u>Administrative Compensation (Act 93) Plan</u> Any language provided in a currently valid Administrative Compensation (Act 93) Plan shall supersede this policy.
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Detailed Plan for Professional Development
Cover Sheet

An applicant for a leave of absence for professional development must submit for Board approval a detailed plan for professional development. The plan must indicate the purpose of the leave, what will be done while on leave to fulfill its purpose, and what evidence will be submitted to demonstrate that the purposes of the leave were fulfilled. Complete the pertinent parts of this cover sheet and attach your detailed plans for review and approval.

1. How is this plan directly related to your professional responsibilities? _____

2. How does this plan relate to the requirements for a professional certificate or commission or improvement of professional competency? _____

3. Do you plan to engage in graduate level study? _____
(Provide complete details in your plan.)
4. What evidence will you provide at the completion of the leave in addition to a narrative report to demonstrate that you have fulfilled the plan? _____

Signature of Applicant

Date

NOTE: Attach complete details of the study-related activities in which you will be engaged if this leave for professional development is approved.

~~~~~  
Superintendent's Action:

☐ Approved

☐ Disapproved

Reason for Disapproval \_\_\_\_\_  
\_\_\_\_\_

Signature of Superintendent \_\_\_\_\_ Date \_\_\_\_\_

Referred for Board Action \_\_\_\_\_  
~~~~~

Board Action:

☐ Approved

Date

☐ Disapproved

Date

EXHIBIT "D"

EMPLOYEE "CAFETERIA" PLAN

Term Life Insurance Coverage

See Exhibit "E"

Coverage Level: Base Plan Buy-Up
Penna. School Boards Association Members will have the option to
Insurance Trust (or equivalent) buy additional coverage for
200% of employee's annual earnings spouse or children.

Medical Coverage

See Exhibit "F"

Coverage Level: Base Plan Buy-Up Opt-Down
Blue Cross/Blue Shield Blue Cross/Blue Shield Blue Cross/Blue Shield
Personal Choice Option 20 Personal Choice Option 5 Personal Choice Option 15/25/70

Dental Coverage

See Exhibit "G"

Coverage Level: Base Plan Buy-Up Buy-Up
School Claims Service, LLC School Claims Service, LLC School Claims Service, LLC
Basic Services \$1,000 \$500 Additional Basic Services \$500 Additional Type "D"
Annual Max/Type "D" Services Services

Vision Coverage

See Exhibit "H"

Coverage Level: Base Plan
School Claims Service, LLC
Vision Examination
Lenses
Contacts
Professional Services
(Percentages vary)

Prescription Coverage

See Exhibit "I"

Coverage Level: Base Plan
Advance PCS
\$10 Generic Drugs
\$20 Name Brand Drugs
Mail Order - \$2 co-pay

Weekly Indemnity (Short-Term Disability Insurance)

See Exhibit "J"

Coverage Level: Base Plan
Liberty Mutual Insurance Company (or Equivalent)
67% of basic weekly earnings to a maximum of \$2,400 per week up to 39 weeks

Long-Term Disability Insurance

See Exhibit "J"

Coverage Level: Base Plan
Penna. School Boards Association Insurance Trust (or equivalent)
60% of basic weekly earnings to a maximum of \$6,900 per month

EXHIBIT "E"

LIFE INSURANCE PLAN

1.1 PENNSYLVANIA SCHOOL BOARDS ASSOCIATION INSURANCE TRUST

1.1.1. ELIGIBLE CLASS

All permanent Act 93 Unit Members

1.1.2. PLAN EFFECTIVE DATE

July 1, 1996

1.1.3. BASIS OF INSURANCE

This insurance is provided on a non-contributory basis.

1.1.4. QUALIFYING PERIOD

The first day of employment

1.1.5. BENEFIT

Amount equal to 200% of the person's annual earnings (rounded to the next higher \$1,000 of benefit) to a maximum benefit of \$200,000.

Members will have the option to buy additional coverage for spouse and children.

EXHIBIT "F-1"

HOSPITALIZATION AND MAJOR MEDICAL PROGRAM

**BLUE CROSS/BLUE SHIELD PERSONAL CHOICE 20
SUMMARY OF BENEFITS**

Benefit	In-Network	Out-of-Network*
Deductible Individual Family	\$0 \$0	\$500 \$1,000
After Deductible, Plan Pays	100%	80%
Out-of-Pocket Maximum Individual Family	None None	\$3,000 \$6,000
Lifetime Maximum (include psychiatric services)	Unlimited	\$1 Million
Doctor's Office Visits Primary Care Services Specialist Services	\$20 Copayment \$20 Copayment	80%, after deductible 80%, after deductible
Preventive Care for Adults and Children	\$20 Copayment	80%, after deductible
Pediatric Immunizations	100%	80%, NO deductible
Routine Gynecological Exam/Pap 1 per calendar year for women of any age	100%	80%, NO deductible
Mammogram	100%	80%, NO deductible
Maternity First OB visit Hospital	\$20 Copayment 100%	80%, after deductible 80%, after deductible
Inpatient Hospital Services	100%	80%, after deductible
Inpatient Hospital Days	365	70
Outpatient Surgery	100%	80%, after deductible
Emergency Room	\$40 Copayment (waived if admitted)	\$40 Copayment, NO deductible (waived if admitted)
Outpatient Laboratory	100%	80%, after deductible
Outpatient Radiology	100%	80%, after deductible
Therapy Services Physical, Speech and Occupational Cardiac Rehabilitation (36 visits per calendar year) Pulmonary Rehabilitation (12 visits per calendar year) Respiratory Therapy	\$20 Copayment \$20 Copayment \$20 Copayment \$20 Copayment	80%, after deductible 80%, after deductible 80%, after deductible 80%, after deductible
Restorative Services, Including Chiropractic Care	\$20 Copayment	80%, after deductible
Chemo/Radiation and Renal Dialysis Therapy	100%	80%, after deductible
Outpatient Private Duty Nursing	100%	80%, after deductible
Skilled Nursing Care	100%	80%, after deductible
Hospice and Home Health Care	100%	80%, after deductible
Durable Medical Equipment and Prosthetics	100%	80%, after deductible
Outpatient Diabetic Education	100%	Not covered

Benefit	In-Network	Out-of-Network*
Outpatient Psychiatric 30 visits per calendar year, combined in/out-of-network	Visits 1-9: \$20 Copayment Visits 10-30: \$25 Copayment	50%, after deductible up to 20 visits per calendar year
Inpatient Psychiatric 30 day maximum per calendar year, combined in/out-of-network	100%	80%, after deductible up to 20 days per calendar year
Serious Mental Illness Care Outpatient 60 day maximum per calendar year, combined in/out-of-network	Visits 1-9: \$20 Copayment Visits 10+: \$25 Copayment	50%, after deductible
Inpatient 30 day maximum per calendar year, combined in/out-of-network	100%	80%, after deductible
Substance Abuse Treatment Outpatient/Partial Facility Visits 30 visits per calendar year, combined	100%	80%, after deductible
Rehabilitation 30 days per calendar year	100%	80%, after deductible
Detoxification 7 days per admission	100%	80%, after deductible

Lifetime limits also apply to Substance Abuse Treatment

*Out-of-network, non-participating providers may bill you for the difference between the Plan allowance, which is the amount paid by Personal Choice, and the provider's actual charge. This amount may be significant. Claims payments for out-of-network professional providers (physicians) are based on IBC's own fee schedule. For services rendered by hospitals and other facility providers, the allowance may not refer to the actual amount paid by Personal Choice to the provider. Under Independence Blue Cross (IBC) contracts with hospitals and other facility providers, IBC pays using bulk purchasing arrangements that save money at the end of the year but do not produce a uniform discount for each individual claim. Therefore the amount paid by IBC at the time of any given claim may be more or it may be less than the amount used to calculate your liability. It is important to note that all percentages for out-of-network services are percentages of the Plan allowance, not the provider's actual charge.

What Is Not Covered?***

- Assisted fertilization techniques such as, but not limited to, in-vitro fertilization, artificial insemination, GIFT, ZIFT (except as specified in a group contract) - Maintenance of chronic conditions when treatment has reached maximum therapeutic value - Services determined not to be medically necessary or medically appropriate - Hearing aids and hearing examinations for the prescription of hearing aids - Cosmetic services, supplies or treatment - Military or occupational injuries or illness - Experimental or investigative services - Supportive devices for the foot (orthotics), except for podiatric appliances for the prevention of complications associated with diabetes	- Services not billed and performed by a provider properly licensed and qualified to render the medically necessary treatment, service or supply - Charges in excess of benefit maximums or allowable charges as set forth in the group contract - Dental and vision care (except as specified in a group contract) - Immunization required for employment or travel - Routine foot care - Acupuncture - Inpatient private duty nursing - Benefits payable by the government, Medicare or through motor vehicle insurance
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***This summary represents only a partial listing of the benefits and exclusions of the Personal Choice program described in this summary. If your employer purchases another program, the benefits and exclusions may differ. Also, benefits and exclusions may be further defined by medical policy. This managed care plan may not cover all of your health care expenses. Read your benefit booklet carefully for a complete listing of the terms, limitations and exclusions of the program. If you need more information, please call 1-800-626-8144 (outside Philadelphia) or 215-557-7577 (if calling within the Philadelphia area).

Services That Require Pre-Authorization

Service	In-Network (Personal Choice network provider or BlueCard PPO Provider)	Out-of-Network
ALL NON-EMERGENCY INPATIENT ADMISSIONS (EXCEPT MATERNITY ADMISSIONS)	Required	Required
OUTPATIENT SURGICAL PROCEDURES		
Bunionectomy	Required	Required
Cataract Surgery	NOT Required	Required
Laparoscopic Cholecystectomy	Required	Required
Hemorrhoidectomy	Required	Required
Hernia Repair	NOT Required	Required
Arthroscopic Knee Surgery/Diagnostic	Required	Required
Arthroscopy		
Ligation and Stripping of Varicose Veins	Required	Required
Obesity Surgery	Required	Required
Prostate Surgery	NOT Required	Required
Spinal/Vertebral Surgery	NOT Required	Required
Submucous Resection (nasal surgery)	Required	Required
Tonsillectomy and/or Adenoidectomy	Required	Required
TRANSPLANTS	Required	Required
OPERATIVE AND DIAGNOSTIC ENDOSCOPIES	NOT Required	Required
MRI	NOT Required	Required
CT SCAN	NOT Required	Required
PET SCAN	Required	Required
OUTPATIENT THERAPIES:	Required	Required
Speech, Cardiac, Pulmonary, Respiratory, Infusion		
OUTPATIENT PRIVATE DUTY NURSING	Required	Required
OTHER FACILITY SERVICES:	Required	Required
Skilled Nursing, Inpatient Hospice, Home Health, Birth Center		
PSYCHIATRIC, SUBSTANCE ABUSE AND SERIOUS MENTAL ILLNESS TREATMENT:		
Inpatient	Required	Required
Outpatient and Partial Facility	Required	Not Required
NON-EMERGENCY AMBULANCE	Required	Required
DURABLE MEDICAL EQUIPMENT	Required	Required
Purchase items over \$100, including repairs and replacements, and ALL rentals		
PROSTHETICS	Required	Required
Purchase items over \$100, including repairs and replacements, and ALL rentals		

Personal Choice network providers will obtain pre-authorization for you, if it is required for the service provided. You are not required to obtain pre-authorization when you are treated in a Personal Choice network hospital or facility, or by a Personal Choice network doctor. Members are not responsible for financial penalties because a Personal Choice network provider does not obtain prior approval.

If you use a provider who is a BlueCard PPO network provider, or an out-of-network provider, you must obtain pre-authorization if required for the service or supply being provided. You may be subject to financial penalties if you do not obtain pre-authorization.

Call Independence Blue Cross at the pre-authorization telephone number listed on the back of your identification card to initiate pre-authorization.

You may be responsible for financial penalties if you do not pre-authorize services when you use a BlueCard PPO provider, or an out-of-network provider. There is a \$1,000 penalty for failure to pre-authorize inpatient services or treatment, and a 20% reduction in benefits for failure to pre-authorize outpatient services or treatment.

Pre-authorization is not a determination of eligibility or a guarantee of payment. Coverage and payment are contingent upon, among other things, the patient being eligible, i.e., actively enrolled in the health benefits plan with the pre-authorization is issued and when approved services occur. Coverage and payment are also subject to limitations, exclusions, and other specific terms of the health benefits plan that apply to the coverage request.

EXHIBIT "F-2"

HOSPITALIZATION AND MAJOR MEDICAL PROGRAM

BLUE CROSS/BLUE SHIELD PERSONAL CHOICE 5

SUMMARY OF BENEFITS

Benefit	In-Network	Out-of-Network*
Deductible		
Individual	\$0	\$250
Family	\$0	\$500
After Deductible, Plan Pays	100%	80%
Out-of-Pocket Maximum		
Individual	None	\$1,000
Family	None	\$2,000
Lifetime Maximum (include psychiatric services)	Unlimited	\$1 Million
Doctor's Office Visits		
Primary Care Services	\$5 Copayment	80%, after deductible
Specialist Services	\$5 Copayment	80%, after deductible
Preventive Care for Adults and Children	\$5 Copayment	80%, after deductible
Pediatric Immunizations	100%	80%, NO deductible
Routine Gynecological Exam/Pap 1 per calendar year for women of any age	100%	80%, NO deductible
Mammogram	100%	80%, NO deductible
Maternity		
First OB visit	\$5 Copayment	80%, after deductible
Hospital	100%	80%, after deductible
Inpatient Hospital Services	100%	80%, after deductible
Inpatient Hospital Days	365	70
Outpatient Surgery	100%	80%, after deductible
Emergency Room	\$25 Copayment (waived if admitted)	\$25 Copayment (waived if admitted)
Outpatient Laboratory	100%	80%, after deductible
Outpatient Radiology	100%	80%, after deductible
Therapy Services		
Physical, Speech and Occupational Cardiac Rehabilitation (36 visits per calendar year)	\$10 Copayment	80%, after deductible
Pulmonary Rehabilitation (12 visits per calendar year)	\$10 Copayment	80%, after deductible
Respiratory Therapy	\$10 Copayment	80%, after deductible
Restorative Services, Including Chiropractic Care	\$10 Copayment	80%, after deductible
Chemo/Radiation and Renal Dialysis Therapy	100%	80%, after deductible
Outpatient Private Duty Nursing	100%	80%, after deductible
Skilled Nursing Care	100%	80%, after deductible
Hospice and Home Health Care	100%	80%, after deductible
Durable Medical Equipment and Prosthetics	100%	80%, after deductible
Outpatient Diabetic Education	100%	Not covered

Benefit	In-Network	Out-of-Network*
Outpatient Psychiatric 30 visits maximum per calendar year, combination of in/out-of-network	Visits 1-9: \$5 Copayment Visits 10-30: \$15 Copayment	50%, after deductible up to 20 visits per calendar year
Inpatient Psychiatric 30 day maximum per calendar year, combination of in/out-of-network	100%	80%, after deductible up to 20 days per calendar year
Serious Mental Illness Care Outpatient 60 day maximum per calendar year, combination of in/out-of-network	Visits 1-9: \$5 Copayment Visits 10+: \$15 Copayment	50%, after deductible
Inpatient 30 day maximum per calendar year, combination of in/out-of-network	100%	80%, after deductible
Substance Abuse Treatment Outpatient/Partial Facility Visits 30 visits per calendar year	100%	80%, after deductible
Rehabilitation 30 days per calendar year	100%	80%, after deductible
Detoxification 7 days per admission	100%	80%, after deductible

Lifetime limits also apply to Substance Abuse Treatment

*Out-of-network, non-participating providers may bill you for the difference between the Plan allowance, which is the amount paid by Personal Choice, and the provider's actual charge. This amount may be significant. Claims payments for out-of-network professional providers (physicians) are based on IBC's own fee schedule. For services rendered by hospitals and other facility providers, the allowance may not refer to the actual amount paid by Personal Choice to the provider. Under Independence Blue Cross (IBC) contracts with hospitals and other facility providers, IBC pays using bulk purchasing arrangements that save money at the end of the year but do not produce a uniform discount for each individual claim. Therefore the amount paid by IBC at the time of any given claim may be more or it may be less than the amount used to calculate your liability. It is important to note that all percentages for out-of-network services are percentages of the Plan allowance, not the provider's actual charge.

What Is Not Covered?***

- Assisted fertilization techniques such as, but not limited to, in-vitro fertilization, artificial insemination, GIFT, ZIFT (except as specified in a group contract) - Supportive devices for the foot (orthotics), except for podiatric appliances for the prevention of complications associated with diabetes - Maintenance of chronic conditions when treatment has reached maximum therapeutic value - Dental and vision care (except as specified in a group contract) - Hearing aids and hearing examinations for the prescription of hearing aids - Cosmetic services, supplies or treatment - Military or occupational injuries or illness - Experimental or investigative services	- Services not billed and performed by a provider properly licensed and qualified to render the medically necessary treatment, service or supply - Charges in excess of benefit maximums or allowable charges as set forth in the group contract - Services determined not to be medically necessary or medically appropriate - Benefits payable by the government, Medicare or through motor vehicle insurance - Immunization required for employment or travel - Routine foot care - Inpatient private duty nursing - Acupuncture
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***This summary represents only a partial listing of the benefits and exclusions of the Personal Choice program described in this summary. If your employer purchases another program, the benefits and exclusions may differ. Also, benefits and exclusions may be further defined by medical policy. This managed care plan may not cover all of your health care expenses. Read your benefit booklet carefully for a complete listing of the terms, limitations and exclusions of the program. If you need more information, please call 1-800-626-8144 (outside Philadelphia) or 215-557-7577 (if calling within the Philadelphia area).

Services That Require Pre-Authorization

Service	In-Network (Personal Choice network provider or BlueCard PPO Provider)	Out-of-Network
ALL NON-EMERGENCY INPATIENT ADMISSIONS (EXCEPT MATERNITY ADMISSIONS)	Required	Required
OUTPATIENT SURGICAL PROCEDURES		
Bunionectomy	Required	Required
Cataract Surgery	NOT Required	Required
Laparoscopic Cholecystectomy	Required	Required
Hemorrhoidectomy	Required	Required
Hernia Repair	NOT Required	Required
Arthroscopic Knee Surgery/Dianostic	Required	Required
Arthroscopy		
Ligation and Stripping of Varicose Veins	Required	Required
Prostate Surgery	NOT Required	Required
Spinal/Vertebral Surgery	NOT Required	Required
Submucous Resection (nasal surgery)	Required	Required
Tonsillectomy and/or Adenoidectomy	Required	Required
TRANSPLANTS	Required	Required
OPERATIVE AND DIAGNOSTIC ENDOSCOPIES	NOT Required	Required
MRI	NOT Required	Required
CT SCAN	NOT Required	Required
OUTPATIENT THERAPIES:	Required	Required
Speech, Cardiac, Pulmonary, Respiratory, Infusion		
OUTPATIENT PRIVATE DUTY NURSING	Required	Required
OTHER FACILITY SERVICES:	Required	Required
Skilled Nursing, Inpatient Hospice, Home Health, Birth Center		
PSYCHIATRIC, SUBSTANCE ABUSE AND SERIOUS MENTAL ILLNESS TREATMENT:		
Inpatient	Required	Required
Outpatient and Partial Facility	Required	Not Required
NON-EMERGENCY AMBULANCE	Required	Required
RENTAL OF DURABLE MEDICAL EQUIPMENT	Required	Required
PURCHASE OF DURABLE MEDICAL EQUIPMENT OVER \$100	Required	Required
PROSTHETICS	Required	Required

Personal Choice network providers will obtain pre-authorization for you, if it is required for the service provided. You are not required to obtain pre-authorization when you are treated in a Personal Choice network hospital or facility, or by a Personal Choice network doctor. Members are not responsible for financial penalties because a Personal Choice network provider does not obtain prior approval.

If you use a provider who is a BlueCard PPO network provider, or an out-of-network provider, you must obtain pre-authorization if required for the service or supply being provided. You may be subject to financial penalties if you do not obtain pre-authorization.

Call Independence Blue Cross at the pre-authorization telephone number listed on the back of your identification card to initiate pre-authorization.

You may be responsible for financial penalties if you do not pre-authorize services when you use a BlueCard PPO provider, or an out-of-network provider. There is a \$1,000 penalty for failure to pre-authorize inpatient services or treatment, and a 20% reduction in benefits for failure to pre-authorize outpatient services or treatment.

Pre-authorization is not a determination of eligibility or a guarantee of payment. Coverage and payment are contingent upon, among other things, the patient being eligible, i.e., actively enrolled in the health benefits plan with the pre-authorization is issued and when approved services occur. Coverage and payment are also subject to limitations, exclusions, and other specific terms of the health benefits plan that apply to the coverage request.

EXHIBIT "F-3"

HOSPITALIZATION AND MAJOR MEDICAL PROGRAM

**BLUE CROSS/BLUE SHIELD PERSONAL CHOICE 15/25/70
SUMMARY OF BENEFITS**

Benefit	In-Network	Out-of-Network*
Deductible Individual Family	\$0 \$0	\$500 \$1,000
After Deductible, Plan Pays	100%	70%
Out-of-Pocket Maximum Individual Family	None None	\$3,000 \$6,000
Lifetime Maximum (include psychiatric services)	Unlimited	\$1 Million
Doctor's Office Visits Primary Care Services Specialist Services	\$15 Copayment \$25 Copayment	70%, after deductible 70%, after deductible
Preventive Care for Adults and Children	\$15 Copayment	70%, after deductible
Pediatric Immunizations	100%	70%, NO deductible
Routine Gynecological Exam/Pap 1 per calendar year for women of any age	100%	70%, NO deductible
Mammogram	100%	70%, NO deductible
Maternity First OB visit Hospital	\$15 Copayment \$100 per day (up to \$500 maximum per admission)	70%, after deductible 70%, after deductible
Inpatient Hospital Services	\$100 per day (up to \$500 maximum per admission)	70%, after deductible
Inpatient Hospital Days	365	70
Outpatient Surgery	\$100 Copayment	70%, after deductible
Emergency Room	\$40 Copayment (waived if admitted)	\$40 Copayment (waived if admitted)
Outpatient Laboratory	100%	70%, after deductible
Outpatient Radiology	\$25 Copayment	70%, after deductible
Therapy Services Physical, Speech and Occupational (60 visits per calendar year) Cardiac Rehabilitation (35 visits per calendar year) Pulmonary Rehabilitation (12 visits per calendar year) Respiratory Therapy	\$15 Copayment (visits 1-30) \$25 Copayment (visits 31-60) \$15 Copayment \$15 Copayment \$15 Copayment	70%, after deductible 70%, after deductible 70%, after deductible 70%, after deductible 70%, after deductible
Restorative Services, Including Chiropractic Care (30 visits per calendar year)	\$25 Copayment	70%, after deductible
Chemo/Radiation and Renal Dialysis Therapy	100%	70%, after deductible
Outpatient Private Duty Nursing (360 hours per calendar year)	100%	70%, after deductible
Skilled Nursing Care (120 days per calendar year)	100%	70%, after deductible

Benefit	In-Network	Out-of-Network*
Hospice and Home Health Care	100%	70%, after deductible
Durable Medical Equipment and Prosthetics	\$25 Copayment	70%, after deductible
Outpatient Diabetic Education	100%	Not covered
Outpatient Psychiatric 30 visits maximum per calendar year, combination of in/out-of-network	\$25 Copayment	50%, after deductible up to 20 visits per calendar year
Inpatient Psychiatric 30 day maximum per calendar year, combination of in/out-of-network	\$100 per day (up to \$500 maximum per admission)	70%, after deductible up to 20 visits per calendar year
Serious Mental Illness Care Outpatient 60 day maximum per calendar year, combination of in/out-of-network	\$25 Copayment	50%, after deductible
Inpatient 30 day maximum per calendar year, combination of in/out-of-network	\$100 per day (up to \$500 maximum per admission)	70%, after deductible
Substance Abuse Treatment Outpatient/Partial Facility Visits 30 visits per calendar year	100%	70%, after deductible
Rehabilitation 30 days per calendar year	\$100 per day (up to \$500 maximum per admission)	70%, after deductible
Detoxification 7 days per admission	\$100 per day (up to \$500 maximum per admission)	70%, after deductible

Lifetime limits also apply to Substance Abuse Treatment

*Out-of-network, non-participating providers may bill you for the difference between the Plan allowance, which is the amount paid by Personal Choice, and the provider's actual charge. This amount may be significant. Claims payments for out-of-network professional providers (physicians) are based on IBC's owe fee schedule. For services rendered by hospitals and other facility providers, the allowance may not refer to the actual amount paid by Personal Choice to the provider. Under Independence Blue Cross (IBC) contracts with hospitals and other facility providers, IBC pays using bulk purchasing arrangements that save money at the end of the year but do not produce a uniform discount for each individual claim. Therefore the amount paid by IBC at the time of any given claim may be more or it may be less than the amount used to calculate your liability. It is important to note that all percentages for out-of-network services are percentages of the Plan allowance, not the provider's actual charge.

EXHIBIT "G"

DENTAL CARE PLAN

YOUR GROUP DENTAL INSURANCE PLAN

NOTICE AND PROOF OF CLAIM

Written notice of injury or sickness upon which a claim may be based must be given to the company within twenty (20) days of the date of first loss for which benefits for such injury or sickness may be claimed.

Failure to furnish notice or proof within the time provided herein shall not invalidate, or reduce any claim if it shall be shown not to have been reasonably possible to do so and that such notice or proof was furnished as soon as was reasonably possible.

PAYMENT OF CLAIM

Benefits payable to your dentist will be paid directly to him/her if you have signed the assignment. If the assignment is not signed, benefit payment will be made to you, the employee.

EXAMINATION

The insurance company shall have the right and opportunity to examine the person whose injury or sickness is the basis of claim when and so often as it may reasonably require during the pendency of any claim under the policy.

The carrier authorizes and makes payment of benefits. If a claim is not paid in full, according to the benefits in the policy, the insurance company will furnish notice to the claimant which will specify the reason or describe the additional information required to perfect the claim. Upon written request by the claimant, the insurance company will review the claim in question and give a final written decision on the review within sixty (60) days (or 120 days under special circumstances) after such request is received.

When a covered dental expense arises, please notify the Benefits Office as soon as possible so that steps may be taken to inform the insurance company of your claim. Failure to do these things promptly may cause you to lose rights to benefits that would otherwise be due you.

When a covered dental expense arises, please notify the Benefits Office as soon as possible so that steps may be taken to inform the insurance company of your claim. Failure to do these things promptly may cause you to lose rights to benefits that would otherwise be due you. Preauthorization and claims forms may be obtained at the Business office in the Administration Building.

ACTION AGAINST COMPANY

No action at law or in equity shall be brought against the company prior to sixty (60) days after proof of loss has been filed in accordance with the requirements for proof of claim and unless brought within two (2) years from the expiration of the period during which proof of loss is required.

COORDINATION OF BENEFITS

In the event the coverage described herein overlaps coverage appended (a) under any other prepaid plan of group insurance or care, (b) under any statutory welfare program including but not limited to Medicare, or (c) under personal injury insurance required by law to be offered under automobile insurance policies and affording benefits respecting accidental injury regardless of faults there will be an adjustment of benefits to prevent duplication. For the purpose of establishing whether charges are covered under any such plan or program, it will be presumed that the individual has done everything necessary to obtain benefits to which he is entitled.

PREAUTHORIZATION OF BENEFITS

If a course of treatment can reasonably be expected to involve covered dental charges of One Hundred Dollars (\$100) or more, a description of the procedure to be performed and an estimate of the charges must be filed with the Insurance Company prior to the commencement of the course of treatment.

This requirement will not apply to courses of treatment under \$100 or to emergency treatment, routine oral examinations, ex-rays, and prophylaxis for fluoride treatments.

If you or one of your dependents incurs covered dental expenses payable, as described below, benefits are payable, subject to the co-insurance and maximums specified in this section to the extent such charges are reasonable and customary charges. The term "reasonable and customary charge" means the actual fee charged by a dentist for a service rendered or supply furnished but only to the extent that the fee is reasonable.

PERCENTAGE OF CHARGES PAYABLE

The Company will pay benefits according to the following percentile table of covered charges for which charges benefits are not withheld under another provision hereof:

100% of covered charges insured for Type A dental services

100% of covered charges insured for Type B dental services

80% of covered charges insured for Type C dental services

50% of covered charges insured for Type D dental services

MAXIMUM OF BENEFITS

The total paid for all charges incurred by any individual during any twelve (12) month period (except those incurred in connection with Type D dental services) shall not exceed a maximum of \$1,000.

The total of benefits paid under the policy for all charges incurred by any individual in connection with Type D dental services shall not exceed a lifetime maximum of \$1,000.

"Covered Dental Services" are those services and supplies described below:

TYPE A DENTAL SERVICES ARE:

1. Routine oral examinations and prophylaxis (scaling and cleaning of teeth), once in any six (6) month period.
2. Topical application of fluoride.
3. Space maintainers that replace prematurely lost teeth for children under age nineteen (19).
4. Emergency palliative treatment.

TYPE B DENTAL SERVICES ARE:

1. Dental x-rays including full mouth x-rays (but not more than once in any period of thirty-six (36) consecutive months), supplementary bitewing x-rays (not more than once in a six (6) consecutive month period) and such other dental x-rays as are required in connection with the diagnosis of a specific condition requiring treatment.
2. Extractions and oral surgery except those described under Type D dental services.
3. Amalgam, silicate, acrylic, synthetic porcelain, and composite filling restorations to restore diseased or accidentally broken teeth.
4. General anesthetic when medically necessary and administered in connection with oral or dental surgery.
5. Treatment of periodontal and other disease of the gums and tissues of the mouth.
6. Endodontic treatment, including root canal therapy.
7. Injection of antibiotic drugs by the attending dentist.
8. Repair or recementing of crowns, inlays, onlays, bridgework or dentures; or relining or rebasing of dentures more than six (6) months after the installation of an initial or replacement denture, but not more than one (1) relining or rebasing in any period of thirty-six (36) consecutive months.
9. Inlays, onlays, gold fillings or crown restorations to restore diseased or accidentally broken teeth, but only when the tooth, as a result of extensive cavities or fracture, cannot be restored with an amalgam, silicate, acrylic, synthetic porcelain, or composite filling restoration.

TYPE C DENTAL SERVICES ARE:

1. Initial installation of fixed bridgework (including inlays and crowns as abutments).
2. Initial installation of partial or full removable dentures (including precision attachments) and any adjustments during the six (6) month period following installation.
3. Replacement of an existing partial or full removable denture or fixed bridgework by a new denture or by new bridgework or the addition of teeth to an existing partial removable denture or to bridgework, but only if satisfactory evidence is presented that:
 - (a) The replacement or addition of teeth is required to replace one or more teeth extracted after the existing denture or bridgework was installed; or

- (b) The existing denture or bridgework was installed under this Dental Expense Benefits Program at least five (5) years prior to its replacement and the existing denture or bridgework cannot be made serviceable; or
- (c) The existing denture is an immediate temporary denture which cannot be made permanent and replacement of a permanent denture takes place within twelve (12) months from the date of initial installation of the immediate temporary denture.

Normally, dentures will be replaced by dentures, but if a professionally adequate result can be achieved only with bridgework, such bridgework will be a Covered Dental Service.

TYPE D DENTAL SERVICES

Orthodontic diagnostic procedures and treatment consisting of surgical therapy, appliance therapy, and functional/mysfunctional therapy (including related oral examinations, surgery, and extractions) for children nineteen (19) years of age.

LIMITATIONS

A. RESTORATIVE

1. Gold, baked porcelain restorations, crowns and jackets. If a tooth can be restored with a material such as amalgam, payment of the applicable percentage of the charge for that procedure will be made toward the charge for another type of restoration selected by the patient and the dentist. The balance of the treatment charge remains the responsibility of the patient.
2. Reconstruction. Payment based on the applicable percentage will be made toward the cost of procedures necessary to eliminate oral disease and to replace missing teeth. Appliances or restorations necessary to increase vertical dimension or restore the occlusion are considered, optional and their cost remains the responsibility of the patient.

B. PROSTHODONTICS

1. Partial Dentures. If a cast chrome or acrylic partial denture will restore the dental arch satisfactorily, payment of the applicable percentage of the cost of such procedures will be made toward a more elaborate or precision appliance that patient and dentist may choose to use and the balance of the cost remains the responsibility of the patient.
2. Complete Dentures. If, in the provision of complete denture services, the patient and the dentist decide on personalized restorations or specialized techniques as opposed to standard procedures, payment of the applicable percentage of the cost of the standard denture services will be made toward such treatment and the balance of the cost remains the responsibility of the patient.
3. Replacement of Existing Dentures. Replacement of an existing denture will be a covered dental service only if the existing denture is unserviceable and cannot be made serviceable. Payment based on the applicable percentage will be made toward the cost of services which are necessary to render such appliances serviceable. Replacement of prosthodontic appliances will be a Covered Dental Service only if at least five (5) years have elapsed since date of the initial installation of that appliance under this dental expense benefits program.

ORTHODONTICS

1. If orthodontic treatment is terminated for any reason before completion the obligation to pay benefits will cease with payment to the date of termination. If such services are resumed, benefits for the services, to the extent remaining shall be resumed.

The benefit payment for orthodontic services shall be only for months that coverage is in force.

EXCLUSIONS

"Covered Charges" does not include:

1. Charges for dental services other than those specifically covered herein.
2. Charges for treatment by other than a dentist, except that scaling or cleaning of teeth and topical application of fluoride may be performed by a licensed dental hygienist if the treatment is rendered under the supervision and guidance of and billed for by the dentist.
3. Charges for services or supplies that are cosmetic in nature, including charges for personalization or characterization of dentures.
4. Charges for prosthetic devices (including bridges and crowns) and the fitting thereof which were ordered while the individual was not insured for Dental Expense Benefits or which were ordered while the individual was insured for Dental Expense Benefits but are finally installed or delivered to such individual more than sixty (60) days after termination of coverage.
5. Charges for the replacement of a lost, missing or stolen prosthetic device.
6. Charges for failure to keep a scheduled visit with the dentist.
7. Charges for replacement or repair of an orthodontic appliance.
8. Charges for services or supplies which are compensable under a Worker's Compensation or Employer's Liability Law.
9. Charges for services rendered through a medical department clinic, or similar facility provided or maintained by the patient's employer.
10. Charges for services or supplies for which no charge is made that the employee is legally obligated to pay or for which no charge would be made in the absence of dental expense coverage.
11. Charges for services or supplies which are not necessary, according to accepted standards of dental practice, or which are not recommended or approved by the attending dentist.
12. Charges for services or supplies which do not meet accepted standards of dental practice including charges for services or supplies which are experimental in nature.
13. Charges for services or supplies received as a result of dental disease, defect or injury due to an act of war declared or undeclared.
14. Charges for services or supplies from any governmental agency which are obtained by the individual without cost by compliance with laws or regulations enacted by any federal, state, municipal or other governmental body.
15. Charges for any duplicate prosthetic device or any other duplicate appliance.

16. Charges for any services to the extent for which benefits are payable under any health care program supported in whole or in part by funds of the federal government or any state or political subdivision thereof.
17. Charges for the completion of any insurance forms.
18. Charges for sealants and for oral hygiene and dietary instruction.
19. Charges for a plaque control program.
20. Charges for implantology.

ADDITIONAL DENTAL COVERAGE

Additional dental coverage in the amount of \$500.00 per year is offered to all eligible employees at an additional cost under the Employee Cafeteria Benefit Plan (ECBP). If chosen, the coverage must be elected for the employee and all eligible dependents on the base plan.

Additional dental coverage in the amount of \$500.00 per year is offered to all eligible employees for Type D dental services (orthodontics) at an additional cost under the Employee Cafeteria Benefit Plan (ECBP). If chosen, this coverage must be elected for all eligible dependents on the base plan.

EXHIBIT "H"

VISION BENEFITS

Schedule of Vision Benefits

<u>Covered Item or Service</u>	<u>Maximum Allowance</u>
Complete Examination	
Ophthalmologist	\$25.00
Optometrist	\$25.00
Lens Repair	
Single Vision	\$20.00
Bi-Focal	\$30.00
Tri-Focal	\$40.00
Lenticular	\$80.00
Frames	\$30.00
Contact Lenses	
Single	\$50.00
Pair	\$100.00

Definitions: "Covered Charges" means only reasonable charges for necessary vision care, subject, to the exclusions set forth in the provision captioned "Exclusions."

"Reasonable," in relation to charges for care, means at the level of fees or charges for comparable care that is usual and customary in the area where such care is furnished; provided that any part of a charge for any item or service shall be deemed unreasonable to the extent that it exceeds the Maximum Allowance specified for such item or service in the Schedule of Vision Expense Benefits.

"Necessary," in relation to care, means only necessary to safeguard or restore the health of the recipient.

"Vision Care," means only (a) examination performed by a licensed optometrist or ophthalmologist, (b) lenses prescribed by such a person, (c) frames purchased in conjunction with lenses newly prescribed by such a person.

EXCLUSIONS: Covered charges shall not include:

Charges incurred because of injury arising out of in the course of employment, or because of occupational or other disease or sickness covered by any applicable workman's compensation or occupational disease law.

Charges of a hospital.

Charges for more than one (1) examination in any calendar year.

Charges incurred in any calendar year for more than two (2) lenses.

Charges incurred in any period of two (2) calendar years for more than one (1) set of frames, or one (1) pair of contact lenses.

Charges for routine yearly examinations required by an employer in connection with the occupation of the insured individual.

Charges to the extent that they are payable out of benefits provided pursuant to any welfare plan or program established by statute.

Examinations in a hospital owned or operated by the Federal Government or for any examination or which the individual is not required to pay.

Charges for contact lenses unless required after cataract surgery or when visual acuity is not correctable to 20/70 in the better eye except by their use.

EXHIBIT "I"

ADVANCE PCS PRESCRIPTION COVERAGE

The prescription benefit is managed by Advance PCS, Inc.

BASE PLAN

The base plan provides a prescription drug program with the following co-pays:

- Ten dollars (\$10.00) for generic drugs
- Twenty dollars (\$20.00) for name-brand drugs

This plan shall include oral contraceptives.

MAIL ORDER PROGRAM FEATURE OF BASE PLAN

In addition, this plan provides a mail order prescription program for maintenance drugs with two dollar (\$2.00) co-pay.

EXHIBIT "J"

DISABILITY INCOME PROTECTION PLAN

PLAN OF INSURANCE
(Short Term Disability Plan)

LIBERTY MUTUAL INSURANCE COMPANY

ELIGIBLE CLASS

All permanent Act 93 Unit Members.

PLAN EFFECTIVE DATE

November 1, 1994

BASIS OF INSURANCE

This insurance is provided on a non-contributory basis.

EARNINGS FACTOR **

67%

MAXIMUM WEEKLY BENEFIT **

\$2,400 – with a thirty-nine (39) week limitation

QUALIFYING PERIOD **

Benefits will begin the thirtieth (30th) day of disability due to sickness.

** For more detailed information, please refer to your handbook.

PLAN OF INSURANCE
(Long Term Disability Plan)

PENNSYLVANIA SCHOOL BOARDS ASSOCIATION INSURANCE TRUST

ELIGIBLE CLASSES

All permanent Act 93 Unit Members.

LIMITING AGE

70 Years.

INDIVIDUAL ELIGIBILITY DATE

The date of which you complete one (1) month of continuous service in an eligible class.

PLAN EFFECTIVE DATE

November 1, 1994

BASIS OF INSURANCE

This insurance is provided on a non-contributory basis.

EARNINGS FACTOR **

60%

MAXIMUM MONTHLY BENEFIT **

\$6,900

QUALIFYING PERIOD **

The first six (6) months of any one period of total disability.

SURVIVOR INCOME BENEFITS **

Are Applicable.

** For more detailed information, please refer to your handbook.

PENNSYLVANIA SCHOOL BOARDS ASSOCIATION INSURANCE TRUST

Long Term Disability for Phoenixville Area School District

SUMMARY OF BENEFITS

CLASS 1: ALL EMPLOYEES

Benefit Type: Standard LTD

BENEFIT:	60% of \$11,500 maximum covered monthly earnings.
MAXIMUM BENEFIT:	\$6,900
MINIMUM BENEFIT	\$69.00
ELIMINATION PERIOD:	180 Days
BENEFIT PERIOD:	To age 65/AOEA Standard
DEFINITION OF DISABILITY:	Based on Employee's Own Occupation to the end of the Benefit Period.

GUARANTEED ISSUE:

**RESIDUAL/PARTIAL
BENEFITS:**

Residual to age 65 or to the end of the benefit period, OPI/IOX indexing, 18 months prior earnings definition, with a 80% earnings test.

RESIDUAL/PARTIAL

QUALIFICATION PERIOD:

No period of total disability required, Accumulation Period + 360 Days.

RETURN TO WORK

ADJUSTMENT BENEFIT:

Payable during the first 18 months of Residual Disability.

INTEGRATION:

Direct with Family (Primary & Secondary) Social Security.

EMPLOYEE PARTICIPATION: 100%

EMPLOYER CONTRIBUTIONS: 100%

SURVIVOR BENEFITS:

If employee dies while disabled, 3 times the last monthly benefit will be payable to eligible survivor.

REHABILITATION REVIEW:

Available to all claimants.

SOCIAL SECURITY FREEZE:

Benefits not reduced due to Cost of Living Increases.

WAIVER OF PREMIUM:

Included while benefits are payable.

PREGNANCY COVERAGE:

As any other disability.

PRE-EXISTING CONDITION:

No coverage for disabilities which begin during the first 12 month insured if treatment for disabling condition was received within 6 months prior to the effective date. This limitation may be waived for employees covered by the prior LTD plan and insured on the effective date.

MENTAL DISORDERS:

24 months, or longer if hospital confined.

SUBSTANCE USE DISORDERS: 24 months, or longer if hospital confined.

LEAVE OF ABSENCE COVERAGE: Family Medical Leave Act.

EXHIBIT "K"
SALARY GROUPINGS FOR ADMINISTRATIVE POSITIONS

A.

Superintendent of
Schools

B.

Assistant Superintendent

Business
Manager

C.

Director of Human
Resources

Director of Pupil
Personnel Services

D.

High School Principal

Middle School Principal

E.

Elementary School
Principal
(Dir. of School
Community Relations)

Elementary
School
Principal

Elementary
School
Principal

Elementary School
Principal

F.

High School
Assistant Principal

Director of
Technology

Middle School
Assistant
Principal

Director of
Operations

High School
Assistant Principal

Supervisor of
Reading

Middle School
Assistant
Principal

Comptroller

Supervisor of
Mathematics

Supervisor of
Special Education

Athletic Director

G.

Elementary
Assistant Principal

Elementary
Assistant Principal

H.

Supervisor of
Cust./Maint. Services

Supervisor of Technology
Operations

Child Accounting/
ACCESS Coordinator

I.

Admin. Assistant
(Superintendent)

Admin. Assistant
(Human Resources)

Admin. Assistant
(Asst. Supt.)

J.

Employee
Benefits
Administrator

Community
Relations
Coordinator

Energy
Manager/
Educator

Athletic
Specialist

Community
Outreach/Student
Behavior Supervisor

