

2017/2018 Trust Coverage Agreements: Appendix A.8/ Basic and Special services of PPL

- 4.1 *Basic Legal Services.* “Basic Legal Services” means those Legal Services, including the preparation of appropriate legal correspondence, required by the District in the normal day-to-day operation of the District as follows:
- 4.1.1 Employee contracts and other human resource issues that do not include the initiation of or response to formal hearings or other adversary Proceedings (e.g. employee discipline or termination Proceedings, grievances, etc.) involving an employee;
 - 4.1.2 Statutory and regulatory interpretation;
 - 4.1.3 Written contracts (other than construction contracts, healthcare services contracts, and contracts between the Trust and District);
 - 4.1.4 Equipment leases and lease purchase agreements;
 - 4.1.5 Facility use agreements;
 - 4.1.6 Procurement statutes, rules, regulations, and contracts;
 - 4.1.7 Intergovernmental agreements;
 - 4.1.8 Public meeting law and public record law issues;
 - 4.1.9 Attendance at Governing Board meetings, if at the request of the District;
 - 4.1.10 Landlord/tenant issues;
 - 4.1.11 Business document reviews, including District operating policies and procedures;
 - 4.1.12 School finance issues (other than tax, debt, and public financing issues); and
 - 4.1.13 Legal Expenses necessary to assist in providing Special Legal Services.

“Basic Legal Services” does not include any services relating to, sought regarding, or necessary in connection with a Proceeding—including representation in connection with a Proceeding.

- 4.9 *Special Legal Service.* “Special Legal Services” means those Legal Services, other than Basic Legal Services, required by the District to address certain legal issues or employee discipline or termination Proceedings, but only to the extent Legal Expenses have been authorized in advance by the Trust, as follows:

- 4.9.1 Copyright, patent, trademark, and other intellectual property issues—but not including any Proceedings;

- 4.9.2 The initiation of or response to formal employee discipline or termination Proceedings, including employee grievances;
- 4.9.3 Zoning and condemnation issues—but not including any Proceedings;
- 4.9.4 Special education issues—but not including any Proceedings;
- 4.9.5 Construction contracts—but not including any Proceedings;
- 4.9.6 Healthcare contracts—but not including any Proceedings;
- 4.9.7 Real estate issues—but not including any Proceedings;
- 4.9.8 Debt and public finance issues—but not including any Proceedings;
- 4.9.9 Student suspension and expulsion issues—but not including any Proceedings;
- 4.9.10 Legislative lobbying, legislative analysis, and legislative interpretation—but not including any Proceedings;
- 4.9.11 Insurance and self-insurance coverage review and consultation (but not relating to whether coverage exists under any Trust Agreement and not including any Proceedings); and
- 4.9.12 Election law consultation.

Specific legal services not classified as "basic legal services"

All services not listed above. One example of this would be an employee conduct issue, when the employee and/or district is under investigation for action or inaction.

Coverage Policies with The Trust for the 17/18 SY

- General liability (including Governing Board and Teacher Professional Liability) & aligning Excess coverage for when the initial general policy is maxed
- Automotive liability
- Administrative Practices liability
- Property
- Automotive Physical Damage
- Equipment Breakdown
- Commercial Crime
- Storage Take Liability
- Pre-Paid Legal