

Regular Board of Education Meeting

August 3, 2020 6:00 PM

Robert J. Smallridge School Administration Building

I. Call to Order

II. Pledge of Allegiance

III. Approval of Agenda

IV. Special Reports/Presentations

A. Good News

V. Public Forum

VI. Consent Agenda

A. Board Minutes: 6-15-20; 7-17-20; 7-23-20

VII. Items for Action

A. FY21 Auditor's Contract

B. Board Policy 4.205 Enrollment in College Level Courses - First Reading

C. Deletion of Board Policy 4.203 Advanced College Placement - First Reading

D. FY21 Anderson County Head Start Contract

E. FY'21 IDEA Innovation Grant

F. FY21 Budget Transfer #1 - First Reading

G. FY21 Family Resource Center Grant

H. Purchase of Aviation Equipment

I. Purchase of MiFi's

J. Addition of a 1.0 Paraprofessional Position at Woodland Elementary

K. Addition of Two .5 FTE ConnectOR Teacher Positions

VIII. Items for Information

A. Sick Leave Bank Board of Trustees

IX. Items for Discussion

X. Old Business

XI. New Business

XII. Communications

XIII. Adjournment



Oak Ridge Schools

OFFICE OF
Finance Director

Telephone (865) 425-9004

MEMORANDUM

To: Dr. Bruce Borchers, Superintendent of Schools
From: Pat Smith, Finance Director
Subject: Recommendation of Audit Firm for FY '21 Audit
Date: July 17, 2020

I recommend that Oak Ridge Schools approve the Audit Firm of Brown Jake & McDaniel, PC for performance of the FY21 Annual Audits. The attached Engagement Letters for FY21 total \$47,410 (Board of Education audit contract amount of \$33,710 and Internal School Funds audit contract amount of \$13,700). The auditing services are budgeted in account code 141-72310-305.

Please let me know if you have questions or need additional information.

BROWN JAKE & McDANIEL, PC

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JOE L. BROWN, CPA, CGFM, CGMA
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JAMES E. BOOHER, CPA, CGMA

MEMBERS
AMERICAN INSTITUTE OF
CERTIFIED PUBLIC ACCOUNTANTS

July 16, 2020

Pat Smith
Finance Director
Oak Ridge Schools
PO Box 6588
Oak Ridge, Tennessee 37831-6588

We are pleased to confirm our understanding of the services we are to provide the Oak Ridge Schools (the Schools) for the year ending June 30, 2021. We will audit the financial statements of the governmental activities, business type activities, each major fund, and the aggregate remaining fund information, including the related notes to the financial statements, which collectively comprise the basic financial statements of the Schools as of and for the year ending June 30, 2021. Accounting standards generally accepted in the United States provide for certain required supplementary information (RSI), such as management's discussion and analysis (MD&A), to accompany the Schools' basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. As part of our engagement, we will apply certain limited procedures to the Schools' RSI in accordance with auditing standards generally accepted in the United States of America. These limited procedures will consist of inquiries of management regarding the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We will not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance. The following RSI is required by generally accepted accounting principles and will be subjected to certain limited procedures, but will not be audited:

- 1) Management's Discussion and Analysis
- 2) Schedule of Changes in the Net Pension Liability (Asset) and Related Ratios Based on Participation in the Public Employee Pension Plan of TCRS
- 3) Schedule of Oak Ridge School System's Contributions Based on Participation in the Public Employee Pension Plan of TCRS
- 4) Schedule of Oak Ridge School System's Proportionate Share of the Net Pension Asset – Teacher Legacy Pension Plan of TCRS
- 5) Schedule of Oak Ridge School System's Contributions – Teacher Legacy Pension Plan of TCRS
- 6) Schedule of Oak Ridge School System's Contributions – Teacher Retirement Plan of TCRS
- 7) Notes to Required Supplementary Information – Public Employee Pension Plan of TCRS
- 8) Schedule of Funding Progress for Other Postemployment Benefits

We have also been engaged to report on supplementary information other than RSI that accompanies the Schools' financial statements. We will subject the following supplementary information to the auditing procedures applied in our audit of the financial statements and certain additional procedures, including comparing and reconciling such information directly to the underlying accounting and other records used to prepare the financial statements or to the financial statements themselves, and other additional procedures in accordance with auditing standards generally accepted in the United States of America, and we will provide an opinion on it in relation to the financial statements as a whole, in a report combined with our auditor's report on the financial statements:

- 1) Combining Fund Financial Statements:
 - a) Combining Balance Sheet – Nonmajor Governmental Funds
 - b) Combining Statement of Revenues, Expenditures and Changes in Fund Balances – Budget and Actual – Nonmajor Governmental Funds
- 2) Schedule of Expenditures of Federal and State Awards
- 3) Schedule of Expenditures of Noncash Federal Awards
- 4) Schedule of Cash and Investments
- 5) Schedule of Long-Term Principal and Interest Requirements by Issue – Governmental Activities

The following other information accompanying the financial statements will not be subjected to the auditing procedures applied in our audit of the financial statements, and our auditor's report will not provide an opinion or any assurance on that other information:

- 1) Introductory Section
- 2) Statistical Section

Audit Objectives

The objective of our audit is the expression of opinions as to whether your basic financial statements are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles and to report on the fairness of the additional information referred to in the first paragraph when considered in relation to the basic financial statements taken as a whole. The objective also includes reporting on—

- Internal control related to the financial statements and compliance with laws, regulations, and the provisions of contracts or grant agreements, noncompliance with which could have a material effect on the financial statements in accordance with *Government Auditing Standards*.
- Internal control over compliance related to major programs and an opinion (or disclaimer of opinion) on compliance with federal statutes, regulations, and the terms and conditions of federal awards that could have a direct and material effect on each major program in accordance with the Single Audit Act Amendments of 1996 and Title 2 U.S. *Code of Federal Regulations* (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance).

The *Government Auditing Standards* report on internal control over financial reporting and on compliance and other matters will include a paragraph that states that (1) the purpose of the report is solely to describe the scope of testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance, and (2) the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The Uniform Guidance report on internal control over compliance will include a paragraph that states that the purpose of the report on internal control over compliance is solely to describe the scope of testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Both reports will state that the report is not suitable for any other purpose.

Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America; the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; the Single Audit Act Amendments of 1996; and the provisions of the Uniform Guidance, and will include tests of accounting records, a determination of major program(s) in accordance with the Uniform Guidance, and other procedures we consider necessary to enable us to express such opinions. We will issue written reports upon completion of our single audit. Our reports will be addressed to Board of Education of Oak Ridge Schools. We cannot provide assurance that unmodified opinions will be expressed. Circumstances may arise in which it is necessary for us to modify our opinions or add emphasis-of-matter or other-matter paragraphs. If our opinions on the financial statements or the single audit compliance opinions are other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed opinions, we may decline to express opinions or issue reports, or we may withdraw from this engagement.

Audit Procedures—General

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements. We will plan and perform the audit to obtain reasonable rather than absolute assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the government or to acts by management or employees acting on behalf of the government. Because the determination of abuse is subjective, *Government Auditing Standards* do not expect auditors to provide reasonable assurance of detecting abuse.

Because of the inherent limitations of an audit, combined with the inherent limitations of internal control, and because we will not perform a detailed examination of all transactions, there is a risk that material misstatements or noncompliance may exist and not be detected by us, even though the audit is properly planned and performed in accordance with U.S. generally accepted auditing standards and *Government Auditing Standards*. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements or major programs. However, we will inform the appropriate level of management of any material errors, any fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential, and of any material abuse that comes to our attention. We will include such matters in the reports required for a single audit. Our responsibility as an auditor is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, and may include tests of the physical existence of inventories, and direct confirmation of receivables and certain other assets and liabilities by correspondence with selected individuals, funding sources, creditors, and financial institutions. We will request written representations from your attorneys as part of the engagement, and they may bill you for responding to this inquiry. At the conclusion of our audit, we will require certain written representations from you about your responsibilities for the financial statements; schedule of expenditures of federal and state awards; federal award programs; compliance with laws, regulations, contracts, and grant agreements; and other responsibilities required by generally accepted auditing standards.

Audit Procedures—Internal Control

Our audit will include obtaining an understanding of the government and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. Our tests, if performed, will be less in

scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*.

As required by the Uniform Guidance, we will perform tests of controls over compliance to evaluate the effectiveness of the design and operation of controls that we consider relevant to preventing or detecting material noncompliance with compliance requirements applicable to each major federal award program. However, our tests will be less in scope than would be necessary to render an opinion on those controls and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to the Uniform Guidance.

An audit is not designed to provide assurance on internal control or to identify significant deficiencies or material weaknesses. However, during the audit, we will communicate to management and those charged with governance internal control related matters that are required to be communicated under AICPA professional standards, *Government Auditing Standards*, and the Uniform Guidance.

Audit Procedures—Compliance

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of the Schools' compliance with provisions of applicable laws, regulations, contracts, and agreements, including grant agreements. However, the objective of those procedures will not be to provide an opinion on overall compliance and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

The Uniform Guidance requires that we also plan and perform the audit to obtain reasonable assurance about whether the auditee has complied with applicable federal statutes, regulations, and the terms and conditions of federal awards applicable to major programs. Our procedures will consist of tests of transactions and other applicable procedures described in the OMB *Compliance Supplement* for the types of compliance requirements that could have a direct and material effect on each of the Schools' major programs. The purpose of these procedures will be to express an opinion on the Schools' compliance with requirements applicable to each of its major programs in our report on compliance issued pursuant to the Uniform Guidance.

Other Services

We will also assist in preparing the financial statements, schedule of expenditures of federal and state awards, and related notes of the Schools in conformity with U.S. generally accepted accounting principles and the Uniform Guidance based on information provided by you. These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*.

Management Responsibilities

Management is responsible for (1) establishing and maintaining effective internal controls, including internal controls over federal awards, and for evaluating and monitoring ongoing activities, to help ensure that appropriate goals and objectives are met; (2) following laws and regulations; (3) ensuring that there is reasonable assurance that government programs are administered in compliance with compliance requirements; and (4) ensuring that management and financial information is reliable and properly reported. Management is also responsible for implementing systems designed to achieve compliance with applicable laws, regulations, contracts, and grant agreements. You are also responsible for the selection and application of accounting principles; for the preparation and fair presentation of the financial statements, schedule of expenditures of federal and state awards, and all accompanying information in conformity with U.S. generally accepted accounting principles; and for compliance with applicable laws and regulations (including federal statutes) and the provisions of contracts and grant agreements (including award agreements).

Management is also responsible for making all financial records and related information available to us and for the accuracy and completeness of that information. You are also responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, (2) access to personnel, accounts, books, records, supporting documentation, and other information as needed to perform an audit under the Uniform Guidance, (3) additional information that we may request for the

purpose of the audit, and (4) unrestricted access to persons within the government from whom we determine it necessary to obtain audit evidence.

Your responsibilities also include identifying significant contractor relationships in which the contractor has responsibility for program compliance and for the accuracy and completeness of that information. Your responsibilities include adjusting the financial statements to correct material misstatements and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the government involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the government received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the government complies with applicable laws, regulations, contracts, agreements, and grants. Management is also responsible for taking timely and appropriate steps to remedy fraud and noncompliance with provisions of laws, regulations, contracts, and grant agreements, or abuse that we report. Additionally, as required by the Uniform Guidance, it is management's responsibility to evaluate and monitor noncompliance with federal statutes, regulations, and the terms and conditions of federal awards; take prompt action when instances of noncompliance are identified including noncompliance identified in audit findings; promptly follow up and take corrective action on reported audit findings; and prepare a summary schedule of prior audit findings and a separate corrective action plan. The summary schedule of prior audit findings should be available for our review on May 1, 2021.

You are responsible for identifying all federal awards received and understanding and complying with the compliance requirements and for the preparation of the schedule of expenditures of federal and state awards (including notes and noncash assistance received) in conformity with the Uniform Guidance. You agree to include our report on the schedule of expenditures of federal and state awards in any document that contains and indicates that we have reported on the schedule of expenditures of federal and state awards. You also agree to include the audited financial statements with any presentation of the schedule of expenditures of federal and state awards that include our reports thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the schedule of expenditures of federal and state awards in accordance with the Uniform Guidance; (2) you believe the schedule of expenditures of federal and state awards, including its form and content, is stated fairly in accordance with the Uniform Guidance; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the schedule of expenditures of federal and state awards.

You are also responsible for the preparation of the other supplementary information, which we have been engaged to report on, in conformity with U.S. generally accepted accounting principles. You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the supplementary information in accordance with GAAP; (2) you believe the supplementary information, including its form and content, is fairly presented in accordance with GAAP; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the supplementary information.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies of previous financial audits, attestation engagements, performance audits, or other studies related to the objectives discussed

in the Audit Objectives section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or studies. You are also responsible for providing management's views on our current findings, conclusions, and recommendations, as well as your planned corrective actions, for the report, and for the timing and format for providing that information.

You agree to assume all management responsibilities relating to the financial statements, schedule of expenditures of federal and state awards, and related notes, and any other nonaudit services we provide. You will be required to acknowledge in the management representation letter our assistance with preparation of the financial statements, schedule of expenditures of federal and state awards, and related notes and that you have reviewed and approved the financial statements, schedule of expenditures of federal and state awards, and related notes prior to their issuance and have accepted responsibility for them. Further, you agree to oversee the nonaudit services by designating an individual, preferably from senior management, with suitable skill, knowledge, or experience; evaluate the adequacy and results of those services; and accept responsibility for them.

Engagement Administration, Fees, and Other

We understand that your employees will prepare all cash, accounts receivable, or other confirmations we request and will locate any documents selected by us for testing.

At the conclusion of the engagement, we will complete the appropriate sections of the Data Collection Form that summarizes our audit findings. It is management's responsibility to electronically submit the reporting package (including financial statements, schedule of expenditures of federal and state awards, summary schedule of prior audit findings, auditors' reports, and corrective action plan) along with the Data Collection Form to the federal audit clearinghouse. We will coordinate with you the electronic submission and certification. If applicable, we will provide copies of our report for you to include with the reporting package you will submit to pass-through entities. The Data Collection Form and the reporting package must be submitted within the earlier of 30 calendar days after receipt of the auditor's reports or nine months after the end of the audit period.

We will provide copies of our reports to Oak Ridge Schools; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing privileged and confidential information, copies of our reports are to be made available for public inspection.

The audit documentation for this engagement is the property of Brown Jake & McDaniel, PC and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to a cognizant or oversight agency for audit (if applicable) or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of Brown Jake & McDaniel PC personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of five years after the report release date or for any additional period requested by the Cognizant Agency, Oversight Agency for Audit, or Pass-through Entity. If we are aware that a federal awarding agency, pass-through entity, or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

We expect to begin our audit on approximately May 15, 2021 and to issue our reports no later than December 31, 2021. Terry Moats is the engagement partner and is responsible for supervising the engagement and signing the reports or authorizing another individual to sign them.

Our fee for these services will be \$33,710.00 and additional fees at normal hourly rates for any non-audit services related to implementation of new GASB Standards/Pronouncements and the related changes to the financial statement presentation. Our invoices for these fees will be rendered each month as work progresses and are

payable on presentation. In accordance with our firm policies, work may be suspended if your account becomes 60 days or more overdue and may not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed upon written notification of termination, even if we have not completed our report(s). You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket costs through the date of termination. The above fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. If significant additional time is necessary, we will discuss it with you and arrive at a new fee estimate before we incur the additional costs.

Government Auditing Standards require that we provide you with a copy of our most recent external peer review report and any letter of comment, and any subsequent peer review reports and letters of comment received during the period of the contract. Our 2018 peer review report accompanies this letter.

We appreciate the opportunity to be of service to Oak Ridge Schools and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

Very truly yours,



BROWN JAKE & McDANIEL, PC

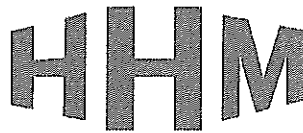
RESPONSE:

This letter correctly sets forth the understanding of Oak Ridge Schools.

By: _____

Title: _____

Date: _____



CERTIFIED PUBLIC ACCOUNTANTS
CHATTANOOGA | MEMPHIS

Report on the Firm's System of Quality Control

November 28, 2018

To The Partners of Brown, Jake & McDaniel, P.C. and the Peer Review Committee of the Tennessee Society of CPAs.

We have reviewed the system of quality control for the accounting and auditing practice of Brown, Jake & McDaniel, P.C. (the firm) in effect for the year ended May 31, 2018. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards). A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System review as described in the standards may be found at www.aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of the system of quality control and the firm's compliance therewith based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, a compliance audit under the Single Audit Act, and audits of employee benefit plans.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Brown, Jake & McDaniel, P.C. in effect for the year ended May 31, 2018, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency* or *fail*. Brown, Jake & McDaniel, P.C. has received a peer review rating of *pass*.

*Henderson Hutcherson
& McCullough, PLLC*

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AN INDEPENDENT MEMBER OF THE BDO ALLIANCE USA



TSCPA Peer Review Program
Administered in Tennessee
By the Tennessee Society of CPAs

AICPA Peer Review Program
Administered in Tennessee
By the Tennessee Society of CPAs

March 04, 2019

Joe Brown
Brown, Jake & McDaniel, P. C.
2607 Kingston Pike Ste 110
Knoxville, TN 37919-3336

Dear Joe Brown:

It is my pleasure to notify you that on February 26, 2019, the Tennessee Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is November 30, 2021. This is the date by which all review documents should be completed and submitted to the administering entity.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Thank you for your cooperation.

Sincerely,

Katie B. Cheek

Katie Cheek
Peer Review Manager
kcheek@tscpa.com 615-377-3825
Tennessee Society of CPAs

cc: Randy Dummer, Frank McDaniel

Firm Number: 900010096645

Review Number: 563728

BROWN JAKE & McDANIEL, PC

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MEMBERS
AMERICAN INSTITUTE OF
CERTIFIED PUBLIC ACCOUNTANTS

July 16, 2020

Pat Smith
Finance Director
Oak Ridge Schools
PO Box 6588
Oak Ridge, Tennessee 37831-6588

We are pleased to confirm our understanding of the services we are to provide the Oak Ridge Schools (the Schools) for the year ending June 30, 2021. We will audit the combined and individual fund balance sheets and the related combined and individual statements of revenues, expenditures and changes in fund balance, including the related notes to the financial statements, which collectively comprise the basic financial statements of the Oak Ridge Schools Internal School Funds as of and for the year ending June 30, 2021.

Audit Objectives

The objective of our audit is the expression of opinions as to whether your basic financial statements are fairly presented, in all material respects, in conformity with U.S. generally accepted accounting principles and to report on the fairness of the additional information referred to in the first paragraph when considered in relation to the basic financial statements taken as a whole. The objective also includes reporting on—

- Internal control related to the financial statements and compliance with laws, regulations, and the provisions of contracts or grant agreements, noncompliance with which could have a material effect on the financial statements in accordance with *Government Auditing Standards*.
- Internal control over compliance related to major programs and an opinion (or disclaimer of opinion) on compliance with federal statutes, regulations, and the terms and conditions of federal awards that could have a direct and material effect on each major program in accordance with the Single Audit Act Amendments of 1996 and Title 2 U.S. *Code of Federal Regulations* (CFR) Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards* (Uniform Guidance), if applicable.

The *Government Auditing Standards* report on internal control over financial reporting and on compliance and other matters will include a paragraph that states that (1) the purpose of the report is solely to describe the scope of testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance, and (2) the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The Uniform Guidance report on internal control over compliance will include a paragraph that states that the purpose of the report on internal control over compliance is solely to describe the scope of testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Both reports will state that the report is not suitable for any other purpose.

Our audit will be conducted in accordance with auditing standards generally accepted in the United States of America; the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States. If applicable, the audit will be conducted in accordance with the Single

Audit Act Amendments of 1996; and the provisions of the Uniform Guidance, and will include tests of accounting records, a determination of major program(s) in accordance with the Uniform Guidance, and other procedures we consider necessary to enable us to express such opinions. We will issue written reports upon completion of our single audit, if applicable. Our reports will be addressed to Board of Education of Oak Ridge Schools. We cannot provide assurance that unmodified opinions will be expressed. Circumstances may arise in which it is necessary for us to modify our opinions or add emphasis-of-matter or other-matter paragraphs. If our opinions on the financial statements or the single audit compliance opinions are other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed opinions, we may decline to express opinions or issue reports, or we may withdraw from this engagement.

Audit Procedures—General

An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements; therefore, our audit will involve judgment about the number of transactions to be examined and the areas to be tested. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the financial statements. We will plan and perform the audit to obtain reasonable rather than absolute assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the government or to acts by management or employees acting on behalf of the government. Because the determination of abuse is subjective, *Government Auditing Standards* do not expect auditors to provide reasonable assurance of detecting abuse.

Because of the inherent limitations of an audit, combined with the inherent limitations of internal control, and because we will not perform a detailed examination of all transactions, there is a risk that material misstatements or noncompliance may exist and not be detected by us, even though the audit is properly planned and performed in accordance with U.S. generally accepted auditing standards and *Government Auditing Standards*. In addition, an audit is not designed to detect immaterial misstatements or violations of laws or governmental regulations that do not have a direct and material effect on the financial statements or major programs. However, we will inform the appropriate level of management of any material errors, any fraudulent financial reporting, or misappropriation of assets that come to our attention. We will also inform the appropriate level of management of any violations of laws or governmental regulations that come to our attention, unless clearly inconsequential, and of any material abuse that comes to our attention. We will include such matters in the reports required for a single audit. Our responsibility as an auditor is limited to the period covered by our audit and does not extend to any later periods for which we are not engaged as auditors.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, and may include tests of the physical existence of inventories, and direct confirmation of receivables and certain other assets and liabilities by correspondence with selected individuals, funding sources, creditors, and financial institutions. We will request written representations from your attorneys as part of the engagement, and they may bill you for responding to this inquiry. At the conclusion of our audit, we will require certain written representations from you about your responsibilities for the financial statements; schedule of expenditures of federal and state awards; federal award programs; compliance with laws, regulations, contracts, and grant agreements; and other responsibilities required by generally accepted auditing standards.

Audit Procedures—Internal Control

Our audit will include obtaining an understanding of the government and its environment, including internal control, sufficient to assess the risks of material misstatement of the financial statements and to design the nature, timing, and extent of further audit procedures. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*.

As required by the Uniform Guidance, we will perform tests of controls over compliance to evaluate the effectiveness of the design and operation of controls that we consider relevant to preventing or detecting material noncompliance with compliance requirements applicable to each major federal award program, if applicable. However, our tests will be less in scope than would be necessary to render an opinion on those controls and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to the Uniform Guidance.

An audit is not designed to provide assurance on internal control or to identify significant deficiencies or material weaknesses. However, during the audit, we will communicate to management and those charged with governance internal control related matters that are required to be communicated under AICPA professional standards, *Government Auditing Standards*, and the Uniform Guidance.

Audit Procedures—Compliance

As part of obtaining reasonable assurance about whether the financial statements are free of material misstatement, we will perform tests of the Schools' compliance with provisions of applicable laws, regulations, contracts, and agreements, including grant agreements. However, the objective of those procedures will not be to provide an opinion on overall compliance and we will not express such an opinion in our report on compliance issued pursuant to *Government Auditing Standards*.

If applicable, the Uniform Guidance requires that we also plan and perform the audit to obtain reasonable assurance about whether the auditee has complied with applicable federal statutes, regulations, and the terms and conditions of federal awards applicable to major programs. Our procedures will consist of tests of transactions and other applicable procedures described in the OMB *Compliance Supplement* for the types of compliance requirements that could have a direct and material effect on each of the Schools' major programs. The purpose of these procedures will be to express an opinion on the Schools' compliance with requirements applicable to each of its major programs in our report on compliance issued pursuant to the Uniform Guidance.

Other Services

We will also assist in preparing the financial statements, schedule of expenditures of federal and state awards, and related notes of the Schools in conformity with U.S. generally accepted accounting principles and the Uniform Guidance based on information provided by you. These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*.

Management Responsibilities

Management is responsible for (1) establishing and maintaining effective internal controls, including internal controls over federal awards, and for evaluating and monitoring ongoing activities, to help ensure that appropriate goals and objectives are met; (2) following laws and regulations; (3) ensuring that there is reasonable assurance that government programs are administered in compliance with compliance requirements; and (4) ensuring that management and financial information is reliable and properly reported. Management is also responsible for implementing systems designed to achieve compliance with applicable laws, regulations, contracts, and grant agreements. You are also responsible for the selection and application of accounting principles; for the preparation and fair presentation of the financial statements, schedule of expenditures of federal and state awards, and all accompanying information in conformity with U.S. generally accepted accounting principles; and for compliance with applicable laws and regulations (including federal statutes) and the provisions of contracts and grant agreements (including award agreements).

Management is also responsible for making all financial records and related information available to us and for the accuracy and completeness of that information. You are also responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, (2) access to personnel, accounts, books, records, supporting documentation, and other information as needed to perform an audit under the Uniform Guidance, (3) additional information that we may request for the purpose of the audit, and (4) unrestricted access to persons within the government from whom we determine it necessary to obtain audit evidence.

Your responsibilities also include identifying significant contractor relationships in which the contractor has responsibility for program compliance and for the accuracy and completeness of that information. Your responsibilities include adjusting the financial statements to correct material misstatements and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the government involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the government received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the government complies with applicable laws, regulations, contracts, agreements, and grants. Management is also responsible for taking timely and appropriate steps to remedy fraud and noncompliance with provisions of laws, regulations, contracts, and grant agreements, or abuse that we report. Additionally, as required by the Uniform Guidance, it is management's responsibility to evaluate and monitor noncompliance with federal statutes, regulations, and the terms and conditions of federal awards; take prompt action when instances of noncompliance are identified including noncompliance identified in audit findings; promptly follow up and take corrective action on reported audit findings; and prepare a summary schedule of prior audit findings and a separate corrective action plan. The summary schedule of prior audit findings should be available for our review on May 1, 2021.

You are responsible for identifying all federal awards received and understanding and complying with the compliance requirements and for the preparation of the schedule of expenditures of federal and state awards (including notes and noncash assistance received) in conformity with the Uniform Guidance. You agree to include our report on the schedule of expenditures of federal and state awards in any document that contains and indicates that we have reported on the schedule of expenditures of federal and state awards. You also agree to include the audited financial statements with any presentation of the schedule of expenditures of federal and state awards that include our reports thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the schedule of expenditures of federal and state awards in accordance with the Uniform Guidance; (2) you believe the schedule of expenditures of federal and state awards, including its form and content, is stated fairly in accordance with the Uniform Guidance; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the schedule of expenditures of federal and state awards.

You are also responsible for the preparation of the other supplementary information, which we have been engaged to report on, in conformity with U.S. generally accepted accounting principles. You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the supplementary information in accordance with GAAP; (2) you believe the supplementary information, including its form and content, is fairly presented in accordance with GAAP; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the supplementary information.

Management is responsible for establishing and maintaining a process for tracking the status of audit findings and recommendations. Management is also responsible for identifying and providing report copies of previous financial audits, attestation engagements, performance audits, or other studies related to the objectives discussed in the Audit Objectives section of this letter. This responsibility includes relaying to us corrective actions taken to address significant findings and recommendations resulting from those audits, attestation engagements, performance audits, or studies. You are also responsible for providing management's views on our current

findings, conclusions, and recommendations, as well as your planned corrective actions, for the report, and for the timing and format for providing that information.

You agree to assume all management responsibilities relating to the financial statements, schedule of expenditures of federal and state awards, and related notes, and any other nonaudit services we provide. You will be required to acknowledge in the management representation letter our assistance with preparation of the financial statements, schedule of expenditures of federal and state awards, and related notes and that you have reviewed and approved the financial statements, schedule of expenditures of federal and state awards, and related notes prior to their issuance and have accepted responsibility for them. Further, you agree to oversee the nonaudit services by designating an individual, preferably from senior management, with suitable skill, knowledge, or experience; evaluate the adequacy and results of those services; and accept responsibility for them.

Engagement Administration, Fees, and Other

We understand that your employees will prepare all cash, accounts receivable, or other confirmations we request and will locate any documents selected by us for testing.

At the conclusion of the engagement, we will complete the appropriate sections of the Data Collection Form that summarizes our audit findings. It is management's responsibility to electronically submit the reporting package (including financial statements, schedule of expenditures of federal and state awards, summary schedule of prior audit findings, auditors' reports, and corrective action plan) along with the Data Collection Form to the federal audit clearinghouse. We will coordinate with you the electronic submission and certification. If applicable, we will provide copies of our report for you to include with the reporting package you will submit to pass-through entities. The Data Collection Form and the reporting package must be submitted within the earlier of 30 calendar days after receipt of the auditor's reports or nine months after the end of the audit period.

We will provide copies of our reports to Oak Ridge Schools; however, management is responsible for distribution of the reports and the financial statements. Unless restricted by law or regulation, or containing privileged and confidential information, copies of our reports are to be made available for public inspection.

The audit documentation for this engagement is the property of Brown Jake & McDaniel, PC and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to a cognizant or oversight agency for audit (if applicable) or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of Brown Jake & McDaniel PC personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

The audit documentation for this engagement will be retained for a minimum of five years after the report release date or for any additional period requested by the Cognizant Agency, Oversight Agency for Audit, or Pass-through Entity. If we are aware that a federal awarding agency, pass-through entity, or auditee is contesting an audit finding, we will contact the party(ies) contesting the audit finding for guidance prior to destroying the audit documentation.

We expect to begin our audit on approximately May 15, 2021 and to issue our reports no later than December 31, 2021. Terry Moats is the engagement partner and is responsible for supervising the engagement and signing the reports or authorizing another individual to sign them.

Our fee for these services will be \$13,700.00 and additional fees at normal hourly rates for any non-audit services related to implementation of new GASB Standards/Pronouncements and the related changes to the financial statement presentation. Our invoices for these fees will be rendered each month as work progresses and are payable on presentation. In accordance with our firm policies, work may be suspended if your account becomes 60 days or more overdue and may not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed upon written notification of

termination, even if we have not completed our report(s). You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket costs through the date of termination. The above fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. If significant additional time is necessary, we will discuss it with you and arrive at a new fee estimate before we incur the additional costs.

Government Auditing Standards require that we provide you with a copy of our most recent external peer review report and any letter of comment, and any subsequent peer review reports and letters of comment received during the period of the contract. Our 2018 peer review report accompanies this letter.

We appreciate the opportunity to be of service to Oak Ridge Schools and believe this letter accurately summarizes the significant terms of our engagement. If you have any questions, please let us know. If you agree with the terms of our engagement as described in this letter, please sign the enclosed copy and return it to us.

Very truly yours,


BROWN, JAKE & McDANIEL, PC

RESPONSE:

This letter correctly sets forth the understanding of Oak Ridge Schools.

By: _____

Title: _____

Date: _____



CERTIFIED PUBLIC ACCOUNTANTS
CHATTANOOGA | MEMPHIS

Report on the Firm's System of Quality Control

November 28, 2018

To The Partners of Brown, Jake & McDaniel, P.C. and the Peer Review Committee of the Tennessee Society of CPAs.

We have reviewed the system of quality control for the accounting and auditing practice of Brown, Jake & McDaniel, P.C. (the firm) in effect for the year ended May 31, 2018. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards). A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System review as described in the standards may be found at www.aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of the system of quality control and the firm's compliance therewith based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, a compliance audit under the Single Audit Act, and audits of employee benefit plans.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Brown, Jake & McDaniel, P.C. in effect for the year ended May 31, 2018, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency* or *fail*. Brown, Jake & McDaniel, P.C. has received a peer review rating of *pass*.

Henderson Hutcherson
& McCullough, PLLC

1200 Market Street, Chattanooga, TN 37402 | T 423.756.7771 | F 423.265.8125

AN INDEPENDENT MEMBER OF THE BDO ALLIANCE USA

TSCPA Peer Review Program
Administered in Tennessee
By the Tennessee Society of CPAs

AICPA Peer Review Program
Administered in Tennessee
By the Tennessee Society of CPAs

March 04, 2019

Joe Brown
Brown, Jake & McDaniel, P. C.
2607 Kingston Pike Ste 110
Knoxville, TN 37919-3336

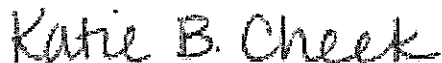
Dear Joe Brown:

It is my pleasure to notify you that on February 26, 2019, the Tennessee Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is November 30, 2021. This is the date by which all review documents should be completed and submitted to the administering entity.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Thank you for your cooperation.

Sincerely,



Katie Cheek
Peer Review Manager
kcheek@tscpa.com 615-377-3825
Tennessee Society of CPAs

cc: Randy Dummer, Frank McDaniel

Firm Number: 900010096645

Review Number: 563728

Oak Ridge Board of Education

| | | | |
|---|--|----------------------------------|----------------------------|
| Monitoring: Review: Annually, in November | Descriptor Term: Enrollment in College Level Courses | Descriptor Code: 4.205 | Issued Date: |
| | | Rescinds: | Issued: 11/24/14 |

- 1 ~~Students who are in good standing may earn high school credit by enrolling in college level courses from~~
2 ~~an institution of higher education.¹ Written approval by the principal shall be required before enrollment.~~
- 3 ~~Grades earned in such college level courses may be used to determine class rank and grade point average,~~
4 ~~provided the grading scale used by the college corresponds with the grading scale of the school system.~~
- 5 ~~The Board shall not be responsible for transportation to and from the college or for payment of tuition.~~
6

Legal References

1. ~~TRR/MS 0520 1 3 .06(5)(b)~~

7 General

8 Students who successfully complete college level courses aligned to a graduation requirement course
9 shall receive high school credit.¹

10 These courses may be offered at the high school,² postsecondary institution, or online. If not offered on
11 the high school campus, the Board shall not be responsible for transportation. Any tuition or fees due to
12 enrollment in college level courses are the responsibility of the parent(s)/guardian(s).

13 Grades earned in such college level courses shall be used to determine class rank, grade point average,
14 and class valedictorian or salutatorian.

15 DUAL ENROLLMENT

16 Students may earn credit by enrolling in a postsecondary institution and taking college level courses.
17 Students who take and pass dual enrollment courses at a postsecondary institution shall have their
18 postsecondary credits accepted for high school credit as a substitution for an aligned graduation
19 requirement course.³

Legal References

1. TRR/MS 0520-01-03-.03(8)
2. TRR/MS 0520-01-03-.03(8)(b)
3. TRR/MS 0520-01-03-.03(8)(a)

Oak Ridge Board of Education

| | | | |
|---|---|----------------------------------|---------------------------------|
| Monitoring: Review: Annually, in November | Descriptor Term: Advanced College Placement | Descriptor Code: 4.203 | Issued Date: 11/24/14 |
| | | Rescinds: | Issued: |



Anderson County Schools

Every Student, Every Day

Office of the Director of Schools

101 South Main Street, Suite 501
Clinton, Tennessee 37716
Office: (865) 463-2800
Fax: (865) 457-9157

Dr. Tim Parrott, Director

2020-2021 ANDERSON COUNTY SCHOOL BOARD of EDUCATION GRANTEE CONTRACT FOR DELEGATE AGENCY

THIS AGREEMENT, made and entered into this date, July 1, 2020 between Anderson County School Board of Education, a public school system in Anderson County, Tennessee (hereinafter referred to as the “Grantee”), and the Oak Ridge School Board of Education (hereinafter referred to as the “Delegate”) (from time to time both the Grantee and the Delegate may be referred to jointly in this Agreement as the “Parties”).

WITNESSETH THAT:

WHEREAS, the Delegate agrees that it has the capability to perform this Agreement and acknowledges that the Anderson County Board of Education is the pass-through entity/recipient and that Oak Ridge Board of Education is the sub-recipient of the federally awarded funds; and

WHEREAS, the Federal Award Identification is awarded to the Anderson County Board of Education, (Federal Award Identification Number 04CH9994) which is the pass-through entity (Grantee) for the sub-award to the sub-recipient (Delegate), Oak Ridge School Board of Education, (Unique Identifier 04CH9994-001) as a sub-award to operate the Oak Ridge Schools’ Head Start program, a federally funded program located at 157 Carver Rd, Oak Ridge 37830; and

WHEREAS, the Grantee on July 1, 2020, will receive a grant administered by the Office of Head Start (OHS), Administration of Children and Families (ACF), and Department of Health and Human Services (HHS) under the Head Start Reauthorization Act of 2007, and said grant is designated as Head Start Grant No. 04CH9994, and

WHEREAS, the sub-award period of performance for this grant is School Year July 1, 2020- June 30, 2021; and the federal award date to the Grantee will be the date when the federal award is signed by the authorized official of the federal awarding agency (5200.39), and

WHEREAS, the Grantee has previously entered into a contract with ACF (hereinafter referred to as the “prime contract”), to conduct a program with purpose of this Agreement; and

WHEREAS, the amount of federal funds obligated by this action by the pass-through entity to the sub-recipient is no more than \$7,393.77 X 118 children, totaling \$872,465 (\$8,933.00 for Training/Technical Assistance, P.A. 20 and \$863,532 for Basic Funding, P.A. 22, in the performance of this contract. All other monies awarded in the form of special grants or expansion will be negotiated between the Grantee and Delegate based on documentation of need, waiting list, and community assessment; and **WHEREAS**, this AGREEMENT will be sub-awarded under the prime contract as

described above; and

WHEREAS, the Delegate’s federal project description is to conduct a “Full Day, School Year” Head Start program in a manner, and to the extent set forth in the approved Head Start application for the program, including the 40% of children served with duration grant funds, to receive and provide services solely to the 118 Head Start children.

WHEREAS, the Oak Ridge Board of Education will be responsible for funding accountability, and responsive to the accountability and monitoring requests of the Grantee for the purpose of operating a Head Start program that is compliant with all HS regulations, performance standards, federal statutes and mandates, Uniform Guidance, state and local licensing requirements and mandates, meet all requirements imposed by the Grantee on the Delegate so that the federal award is used in accordance with federal statutes, regulations, and the terms and conditions of the federal award; and

WHEREAS, the Delegate agrees that it has the capability to perform this Agreement and acknowledges that the Anderson County Board of Education has made every effort to accurately record HS regulations, state and local licensing requirements, performance standards, Uniform Guidance, and federal statutes and mandates and the corresponding numbers, and that the Delegate will be responsible and accountable for all above mentioned requirements whether listed in this Agreement or not; and

WHEREAS, any additional requirements that the Grantee as the pass-through entity imposes on the sub-recipient in order for the pass-through entity to meet its own responsibility to the Federal awarding agency including identification of any required financial, performance reports and system monitoring.

Now, therefore, the Delegate agrees as follows:

AGREEMENT FOR DELEGATION OF SPECIFIC CONDITIONS

- I. The Delegate will perform the following specific conditions:
 - A. Follow Department of Human Services (HHS), Administration for Children and Families (ACF) applicable Public Law and HHS regulations and policies, and Uniform Administrative Requirements 42.U.S.C, Cost Principles 9801, et.seq. and Audit requirements for Federal awards which includes, but not limited to the following:
 - 1. Program regulations promulgated in 45 CFR 1301- Program Governance, 1302- Program Operations, 1303-Financial and Administrative Requirements, 1304-Federal Administrative Procedures, 1305-Definitions and the Head Start Act.
 - 2. Fiscal Regulations: Title 2 CFR Part 200 – Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards.
 - 3. Contractors/Sub-contractors; 29 CFR Part 3, 29 CFR 5.5, 37 CFR Part 93
 - 4. HHS Grants Policy Statement
 - 5. Federal Notice of Award
 - 6. The application approved for financial assistance including the proposed work program, allocated budget, material requests and any amendments, is incorporated by reference.
 - 7. Compliance with all applicable laws, ordinances, codes of the state and local governments, and other Head Start recommendations and regulations, TN Department of Education Licensing Requirements, Laws, and statutes and Region IV requests.

8. The 118 HS children will be served at the Oak Ridge Preschool building at 157 Carver Ave, Oak Ridge, TN 37830,
 9. The Delegate will serve the children the mandated hours issued by the Office of Head Start.
 10. Each classroom in which one or more Head Start children are enrolled shall be included in the Delegate's written comprehensive monitoring plan and shall include the schedule for monitoring all Head Start systems including the classroom facility, health and safety aspects, education service area components, staff qualifications, training requirements, and family services requirements mandated by the Head Start Performance Standards, State Licensing and the Head Start Act.
 11. The Delegate Director will submit to the Oak Ridge School Assistant Superintendent and forward to the Grantee Director all fire, and health and safety inspections reports with documentation of completed corrective actions within 30 days of receiving the report.
 12. The Oak Ridge Board of Education will provide the results of all audits of Head Start funds to the Grantee to the extent to which the sub-award has been audited as a major program. The audit must be submitted to the Grantee upon receipt.
 13. The Delegate agency will be responsible for the total services provided for the Head Start eligible children, including children with disabilities and special diets, which the program serves with no cost to the families. Subject to all of the terms of this Agreement, The Delegate Agency shall adhere to all corrective action or sanction set by the Office of Head Start as directed through the Grantee to meet its own responsibility to meet the federal award grant. 641A(d)
 14. The Delegate will be responsible for its own indirect cost as determined by the State through the Anderson County Government. Likewise, the Delegate will be responsible for its own non-federal share and will keep accurate and up-to-date records of all non-federal shares.
 15. The Grantee may use non-federal share from the Delegate that is above what the Delegate requires. The Delegate will provide the Grantee with requested documents for use of non-federal shares that will be for the program's non-federal share. The Grantee shall be responsible for any outside cost incurred.
- B. Before the children return, and because of the COVID-19 pandemic, the Delegate will submit for Governing Body or Executive Director approval a Plan for reopening the Head Start classrooms and/or serving the children and families for the 2020-2021 school year.
1. Federal and state guidance will be used to create the reopening plan.
 2. Upon the children returning, a written plan for sanitizing and disinfecting the building and classrooms where children and families will be served will be submitted to the Grantee HS Director.
- C. The Delegate will use the same child and family tracking system, screening tools with tracking system, mental health curricula, CLASS instruments, and other instruments as the Grantee.
- D. The Delegate must notify the Grantee Director of any changes or adoptions of the educational curriculum and assessment, and parenting curriculum for Grantee approval.
- E. The Delegate must notify the Grantee Director of the mental health consultant to be used each

school year.

- F. The Delegate must provide the Grantee Director copies of any contracts in which it has the responsibility and which Head Start funds are used as payment or are required by Head Start mandates and requirements.

- F. The Grantee Director will have the responsibility for administration and management of the total grant; however, responsibility for formulation, coordination, implementation and administration of the Oak Ridge Board of Education program is delegated to the Delegate Director, provided, however:
 - a. in the process of hiring a Delegate Director, the Oak Ridge Board of Education shall forward to the Grantee documentation of the job description, job posting, search strategy, screening process, resume, documentation of the interview team's approval of the candidate, and Oak Ridge Board of Education documentation of approval of hire.

- G. The Oak Ridge Schools' administration must ensure that the Head Start Delegate Director has time to effectively fulfill the duties of a Head Start Director, including times and events that require a Head Start Director's time and attendance, and that the Head Start requirements and ongoing monitoring are equally distributed among Head Start staff, and monitored.

- H. The Delegate Director is responsible for preparing and conducting annual professional development and trainings on performance standards, other Head Start mandates, state standards and licensing requirements, and anticipated reviews of all Head Start employees and ensure the implementation of such trainings and have documentation available for monitoring.

- I. The Oak Ridge Schools' administration will ensure that Head Start Family Advocates are employed as to have a caseload that is sufficient to ensure that families are supported in all mandated Head Start Performance Standards. There is a recommendation of no more than forty families per Family Advocate.

- J. The Delegate Director shall ensure that each Family Advocate hired after November 7, 2016 will have a Family Service Credential or equivalent or be working toward the credential using Training/Technical Assistance Funds. The Family Advocate must have the credential earned within 18 months of hire.

- K. The Delegate Director will ensure that communication between the program and the parents is effective including home visits and face to face meetings when the family or program has a need.

- L. All channels of communication including phone calls, correspondence and emails must be handled in the following manner: to and from the Regional/National Office, the channels of communication will be from the Regional/National Office to the Grantee Director to the Delegate Director or from the Delegate Director to the Grantee Director to the Regional/National Office. The Delegate shall forward all correspondence, reports, funding requests, etc. for Regional and National headquarters to the Grantee no less than 4 working days prior to the designated date. The Grantee will decide if it is necessary and appropriate to

forward. In addition, the office of the Delegate's Executive Director of School Leadership shall be available to the Grantee Director as an additional point of contact for the reporting of any compliance issues or other needs, encountered during the period of this Agreement.

1. The Delegate Director may participate in monthly conference calls with the Grantee Director and Region IV program specialist to discuss the Delegate. The Delegate Director shall have all questions/concerns in writing to the Grantee 5 days prior to the call. The date and time is set by the Grantee.
- M. The Delegate Director will ensure the Delegate will operate a Policy Committee in compliance with 1301.3 (a)-(e). The Delegate Policy Council Committee elects from among currently enrolled families in the Oak Ridge Schools' Head Start Program, one (1) parent representative and one (1) alternate parent representative to the Anderson County Head Start Policy Council. The Delegate's policy committee will serve the Delegate program in the role of the policy council in exercising its responsibilities and functions and the Delegate will provide policy committee training on the roles and responsibilities of the committee and other trainings as needed.
1. The Delegate Director will alert in writing, no less than two weeks in advance, the Grantee Director of all Policy Committee dates and times of the meeting to be held.
 2. The Delegate Director must ensure that the number of Policy Committee meetings are sufficient to provide the services needed for the program needs. Executive approval must be kept to a minimum.
 3. The Delegate Director, or designee will attend the Grantee Policy Council meetings and the training that the Policy Council is providing.
- N. Transportation of children from classes to designated locations will be provided by the delegate within the above-cited budget and/or as Non-federal share/in-kind contribution. The Delegate will adhere to all regulations of the National Schools Transportation Specifications and Procedures, and Head Start mandates when children are provided transportation.
- O. The Delegate Director will ensure and implement a plan for keeping classroom technology, materials, supplies and furnishings in good repair and up to date.
- P. The Delegate Director will submit to the Grantee or Grantee's financial officer, or have available for monitoring purposes, such reports as may be required, including but not limited to;
- a. Program financial reports including cost allocation plan.
 - b. Submit to the Grantee Director the "Monthly Summary of Delegate Operations" report for purposes of reporting to the governing body and policy council.
- Q. The Parties' School Board Chairpersons, or their designees, the Parties' School Superintendents/Director of Schools, and the Grantee and Delegate Directors shall meet annually to discuss the program's progress and Head Start expectations and sign the contract.
- R. The Parties' Head Start Directors and upper management will meet mid-year to review the progress of monitoring and related issues. The Delegate Director will be responsible for setting the meetings.
- S. The Delegate must ensure whenever possible that children enrolled in the Grantee's Early Head Start program receive services until enrolled in regular education programs. The Delegate will be responsible to ensure that Head Start enrollment slots are designated for

children enrolled in Early Head Start. These are children who will be turning three years of age during the school year and do not meet the August 15 age deadline, and the parents' request to enroll their children in Head Start. Parents will complete the application process three to six months before the child's third birthday. These children's names will be placed on the Oak Ridge Schools' Head Start wait list and take priority for an open enrollment slot in Head Start. (CFR1305.7(C)).

- T. The Oak Ridge School Board of Education will approve all Delegate Head Start documents that also require approval of the Grantee governing body and provide the appropriate documentation to the Grantee Director.
- U. The Delegate Director is responsible for implementing a CLASS (Classroom Assessment Scoring System) schedule and performing CLASS observations, scoring protocols, feedback to the teaching staff, and analyzing the results. The number of observations required of the Delegate will be equal to the number set by the Grantee Director for the Grantee.
- V. The Delegate Director is responsible for providing all teaching staff, including teacher assistants a minimum of six hours training annually with no less than 3 hours held in the first semester of the school year, on the CLASS instrument and domains that supports the classroom environment, instruction, and effective teacher-child interactions within each CLASS dimension.
- W. The Delegate Director is responsible for ensuring that all management staff attend training specific to their service area/system provided by, or endorsed by The Office of Head Start/Region IV annually.
- X. The Delegate Director is responsible for ensuring that all teachers and teaching assistants who have not received Pyramid Model: Center on the Social and Emotional Foundations for Early Learning (CSEFEL) training in three years receive training by December 2020 in order to promote the social emotional development and school readiness of young children.
- Y. The Delegate Director must ensure a full time position education coordinator or equivalent title.
- Z. The Oak Ridge Board of Education must ensure the employment of an academic coach and ensure that this coach follows a coaching plan with fidelity.
- AA. The Delegate Director will ensure that the approved curriculum is implemented by teaching staff with fidelity and provide documentation for such.
- BB. The Delegate Director is responsible for creating a data plan, gathering and analyzing program data and reporting the information to the Grantee Director.
- CC. The Delegate Director will conduct surveys and analyze program data for the purpose of guiding program goals and monitoring.
- DD. The Delegate Director will plan for budget funds to participate with time, finances, and other needed input in the hiring of a contractor of the Grantee's choice to complete a full Community Assessment every 5 years. The next one will be 2024-2025.

II. Terms of Monitoring:

- A. The Delegate will conduct effective systemic, ongoing monitoring and will provide follow-up on all deficiencies, non-compliance, and corrective actions pertaining to the federal award, discovered through audits, on-site reviews, program systemic monitoring, documents, and other means that have been conducted, and ensure that timely and appropriate action on all deficiencies and corrective action plans be reported to the Grantee.

- B. The Grantee will perform desk monitoring on tracking systems to ensure compliance. The Delegate Director will ensure that the tracking system data is current, as well as perform desk and on-site monitoring. The Delegate Director will ensure that the Grantee has access to the tracking system.
 - a. It is the responsibility of the Delegate Director and administration to provide systemic monitoring. The Delegate will diligently provide monitoring of all areas and systems and keep accurate monitoring records, including corrective action plans and follow-ups as needed. It is understood that this monitoring will be to follow mandates of the Office of Head Start and the TN State Child Care Licensing Rules ensuring compliance, and to perform systemic ongoing-monitoring protocol and procedures for the Oak Ridge Schools' Head Start program, as well as decrease the burden of Delegate monitoring provided by the Grantee staff. It is suggested that the Delegate hire a monitor to complete such monitoring that is completed. The Delegate Director will submit all monitoring documents, corrective action plans, and follow-ups to the Grantee Director monthly. The Delegate Director will be responsible for any corrective actions and follow up needed. Failure to comply with effective on-going monitoring will result in the Grantee hiring a full time monitor, at the expense of the Delegate.
 - b. The Grantee will complete onsite monitoring. The Delegate Director must complete and document systemic monitoring before the onsite monitor performs monitoring tasks. The onsite monitoring cannot be a substitute for the Delegate performing its own regular and systematic monitoring.
- C. To ensure accountability and compliance with program requirements and achievement of performance goals, the Grantee may assess the risk posed by the Delegate by use of the following tools: (200.521)
 - a. Providing training and technical assistance on program related matters;
 - b. Performing on site reviews and monitoring of program operations;
 - c. Verifying audits (200.51)
 - d. Other tools as deemed necessary.
- D. The Grantee will evaluate as to whether the results of the Delegate's audits, on site reviews, or other monitoring indicate conditions that necessitate adjustments to the Grantee's own records.
- E. The Delegate Director is responsible for the Delegate program and submitting statements of compliance with corrective action plans as a result of self-monitoring completed to the Grantee Director according to the timeline. It is the responsibility of the Delegate to send the Grantee documentation of findings and concerns, as well as documentation that the findings and concerns were corrected as a result of the monitoring and be signed by the Oak Ridge Preschool Delegate Director.
- F. Grantee personnel conducting monitoring visits shall monitor files, reports, and/or the facility of each Delegate Head Start classroom based on the monitoring needs for a particular service area. The Delegate Director or designee will accompany the Grantee Director or designee at

all monitoring visits.

- G. The Delegate Director will determine whether other training and technical assistance is needed as identified in needs assessments, evaluations, monitoring findings, etc. and request this through the Grantee director. The Delegate Director is also responsible to implement training that is requested by the Grantee Director should it be determined that other training is needed.
- H. The Grantee will monitor to ensure that all requirements imposed by the Grantee on the Delegate are such that the federal award is used in accordance with federal statutes, regulations and the terms and conditions of the federal award.
- I. The Delegate will attend Head Start conferences, training and technical assistance, and other relevant meetings that support the federal award, program goals, and employee knowledge of requirements.
 - a. The Delegate will also attend training and technical assistance at the Grantee's request to promote compliance and ensure the federal award is used in accordance with federal statutes, regulations and the terms and conditions of the federal award.
- J. The Delegate's School Board of Education will operate, approve, implement and abide by present Head Start regulations, standards, policies, plans, and procedures. These reflect Head Start requirements and all mandates.
 - a. All updated and new policies, plans, and procedures must be sent to the Grantee for governing body approval. The Delegate will update program procedures, plans, and policies annually and submit documentation to the Grantee of completion.
- K. The Delegate will submit a professional grant for the 2020-2021 Program Year that complies with the application process instructions and includes accurate and complete data consistent with the Program Goals two weeks before the governing body's March meeting.
- L. The Delegate will submit all documents that require governing body approval two weeks before the Anderson County School Board's regularly scheduled monthly meeting which meets the 2nd Thursday of each month. The Grantee has the right to change the dates that documents are submitted to the governing body due to changes in the board's meeting time and other unforeseen circumstances.
- M. The Delegate warrants that no person or selling agency or other organization has been employed or retained to solicit or secure this contract upon an agreement or understanding for a commission, percentage, brokerage, or contingent fee. For breach or violation of this warrant the Grantee shall have the right to annul this contract without liability or, at its discretion, to deduct from the contract or otherwise recover the full amount of such commission, percentage, brokerage, or contingent or to seek such other remedies as legally may be available.

- N. The Grantee has the right to visit the Delegate site, meet the staff, perform any type of monitoring of any system, and verify data information without prior notification.

III. Termination of Agreement

- A. The Grantee may take enforcement action against the Delegate by giving 60 day notice and specifying the effective date, initiate suspension, or terminate this contract in whole or in part for reasons that may include but not limited to the following (200.338):
 - a. Failure for any reason, of the Delegate to fulfill its obligations as outlined in this Agreement, the Head Start Act, and any Head Start or State requirements.
 - b. Failure to submit accurate, concise reports and documentation to the Grantee, including corrective action plans, fire inspections, and health and safety inspections.
 - c. Failure to complete systemic, ongoing, self-monitoring according to the established timeline. Written plans/Timelines developed by the Delegate and approved by the Grantee will be used by the Delegate in order to perform accurate monitoring. Monitoring completed by the Delegate must be sent to the Grantee within 20 days from the date of monitoring.
 - d. Ineffective or improper use of Head Start funds as provided in the Agreement and all Head Start and State requirements.
 - e. Suspension or termination by HHS/ACF of funds to the Grantee under which this Agreement is made or the portion delegated under this Agreement.
 - f. Refusal, inability, or unwillingness to comply with any additional requirements as may be required by HHS/ACF under this Grant or any Head Start or State requirement or Region IV request/s.
 - g. The Grantee, in the event of termination, shall require the return of all property, documents, data studies and reports purchased or prepared by the Delegate within 30 days after the effective termination date.
 - h. Termination of the Agreement and appeals of that termination shall be governed by Head Start Performance Standards, Uniform Guidance, Head Start rules and regulations 2 CFR part 180, and federal awarding agencies.

- B. If the Delegate (non-federal entity) fails to comply with federal statutes, regulations or the terms and conditions of a federal award, the federal awarding agency or pass through entity may impose additional conditions, as described in 200.207 specific conditions. If the federal awarding agency or pass-through entity determines that non-compliance cannot be remedied by imposing additional conditions, the federal awarding agency or pass through entity may take one or more of the following actions, as appropriate in the circumstances:
 - a. Temporarily withhold cash payments pending corrections of the deficiency by the non-federal entity or more severe enforcement action by the federal awarding agency or pass through entity. Disallow (that is, deny both use of funds and/or applicable matching credit for) all or part of the cost of the activity or action not in compliance.
 - b. Wholly or partly suspend or terminate the federal award.
 - c. Withhold further federal awards for the project or program.
 - d. Take other remedies that may be legally available.

IV. The Grantee agrees to provide goods and services to include, but not be limited to:

- A. The Grantee will be ultimately responsible for the overall operation of the Delegate program and will perform monitoring visits during the program year to ensure the Delegate is in compliance in all program areas. The Grantee Agency reserves the right to visit the Delegate site, meet the staff and verify data information without prior notification.
- B. Assisting in arrangements of training and technical assistance as identified in needs assessment evaluations, etc., as requested by the Delegate Director.
- C. The Chief Financial Officer will be responsible for monitoring fiscal areas of the Delegate and the Delegate Director will be responsible for obtaining and sending all documents needed for monitoring the fiscal areas of the program. The Delegate Director shall also conduct fiscal monitoring and send monitoring reports to the Grantee Director.
- D. The Grantee Director will be responsible to send to the governing body the reports and items needing approval. The Delegate will send monthly reports of any expenditures, amendments, and transfers to the Grantee Director for governing body for approval within the requested timeframe.

Grantee Contact Information
Anderson County Board of Education Chair
101 South Main Street
Clinton, TN 37716
(865) 463.2800



Anderson County Schools
Every Student. Every Day

Shelby Haun <shaun@acs.ac>

Contract

1 message

Lisa Downard <LMDownard@ortn.edu>

Tue, Jun 23, 2020 at 11:28 AM

To: Shelby Haun <shaun@acs.ac>

Cc: Bruce Lay <BLay@ortn.edu>, Bruce Borchers <btborchers@ortn.edu>

Good morning,

This message is to serve as confirmation that Oak Ridge Schools is in agreement with the proposed 2020-2021 Head Start Grantee-Delegate contract. This agreement is pending approval by both the Anderson County Board of Education and the Oak Ridge Schools Board of Education. The Delegate will present this contract to the Oak Ridge Schools Board of Education on August 3, 2020.

Respectfully,

Lisa M Downard

Principal

Oak Ridge Schools' Preschool/Head Start

(865)425-9101

lmdownard@ortn.edu

In witness whereof, the Grantee and the Delegate have executed this Agreement as of the date first above written for the purpose of guiding their relationship from and after the beginning day of the ~~2019-2020~~ school year.

2020-2021
TP

Oak Ridge Board of Education
Delegate Agency

Anderson County Board of Education
Grantee Agency

Dr. Bruce Borchers, ORS Superintendent

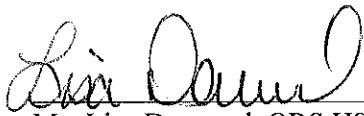


Dr. Tim Parrott, ACS Director of Schools

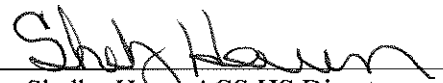
Keyes Fillauer, ORS Board Chair



Dr. John Burrell, ACS Board Chair



Ms. Lisa Downard, ORS HS Director



Ms. Shelby Haun, ACS HS Director

Over the summer, the department announced a new Individuals with Disabilities Education Act (IDEA) Innovation Grant, making \$1 million dollars available for Tennessee school districts to support Tennessee school districts in implementing innovative ways to remediate for the loss of instruction during school closures for students with disabilities. Districts were able to apply using a competitive grant application. Each district, if interested, was to apply for an amount between \$5000 and \$20,000.

Below is the grant application requiring board approval. Items being requested in the grant will help SWDs with access, communication, and platforms to increase academic opportunities in person or with virtual learning. Additional funds are also being sought to extend intercession opportunities for SWDs.

If I can answer any questions, please let me know.

Thank you,

Myles Hebrard

Budget

Oak Ridge (012) Public District - FY 2021 - IDEA Innovation - Rev 0 - IDEA Innovation

Go To

| Indirect Cost | |
|-------------------------------------|-------------|
| Total Contributing to Indirect Cost | \$14,400.00 |
| Indirect Cost Rate | 0.00% |
| Maximum Allowed for Indirect Cost | \$0.00 |

| Action | Account Number | Total |
|----------------------------|--|---------------|
| View | 71200 - Special Education Program | \$20,000.00 |
| View | 72220 - Support Services/Special Education Program | \$0.00 |
| View | 99100 - Transfers Out | \$0.00 |
| Total | | \$20,000.00 |
| Adjusted Allocation | | \$0.00 |
| Remaining | | (\$20,000.00) |

Go To

Production Session Timeout 00:29:55

DOE Resources
 Help for Current Page
 Contact TDOE
 ePlan Sign Out

| Filtering - 2 out of 2 Budget Details match selected filters | | | | | Show All / Clear All |
|--|------------------|---------------|---------------------|---------------------|----------------------|
| Account Number | Line Item Number | Location Code | Tags | Narrative | |
| 71200 - Special Educat... | All | All | No Options Selected | No Options Selected | |

HEBRARD, MYLES

Production

<< First < Previous **1** Next > Last >> Items 1-2 out of 2

Items/Page: 10

Session Timeout
00:29:02

| Budget Detail | | Narrative Description |
|------------------------|--|---|
| Account Number: | 71200 - Special Education Program | Certified staff for SWDs to conduct remediation and intervention opportunities during fall break, spring break, and summer (beyond ESY). \$30/hr X 4 hours a day X 4 days per week X 6 weeks X 5 staff members = \$14,400. No benefits are offered to any staff member when paying (extended contract) stipend to work fall break, spring break, and summer. Benefits are factored into 10 month teacher salary. |
| Line Item Number: | 189 - Other Salaries & Wages | |
| Use of Funds: | Special populations | |
| Optional Program Code: | | |
| Location Code: | Oak Ridge (012) | |
| Quantity: | 1.00 | |
| Cost: | \$14,400.00 | |
| Line Item Total: | \$14,400.00 | |
| Account Number: | 71200 - Special Education Program | ArtsToFrames Kids face shields (clear): 10 pack \$69.99 X 50 packs = \$3499.50. ArtsToFrames Adult face shields (clear): 10 pack \$129.99 X 30 packs = \$3899.70. These will be used for SpEd staff (teachers, TAs, service providers) and older students. ArtsToFrames Sneeze Guard: full panel \$99.99 each X 9 for SLPs and 8 for school psychs to conduct evaluations = \$1299.87. GoPro: HERO8 Black, with 32GB card and spare battery \$349.99 X 16 (8 SLPs, 4 OT and 4 PT) = \$5599.84. |
| Line Item Number: | 725 - Special Education Equipment | |
| Use of Funds: | Necessary resources to address loca... | |
| Optional Program Code: | | |
| Location Code: | Oak Ridge (012) | |
| Quantity: | 1.00 | |
| Cost: | \$5,600.00 | |
| Line Item Total: | \$5,600.00 | |



Oak Ridge Schools

OFFICE OF
Finance Director

Telephone (865) 425-9004

MEMORANDUM

To: Dr. Bruce Borchers, Superintendent of Schools
From: Pat Smith, Finance Director
Subject: **FY'21 Budget Transfer #1**
Date: July 21, 2020

The attached FY'21 Budget Transfer #1 includes the following budget transfer requests for Board of Education approval:

- Adjustment and re-alignment of some salary, benefit, and expenditure budget items
- Transfers to establish NJROTC Position as approved by BOE on July 17, 2020
- Transfer to increase Transportation Contract for COVID disinfection for all buses, as approved by BOE on July 17, 2020
- All other routine budget transfers and revisions from July 1, 2020 through July 21, 2020 (routine transfers, mostly grants) for Board Approval

FY 21 FYTD Budget Summary - Budget Transfer #1

| Fund | FY21 Original Approved Budget | Budget Transfer #1 | FY21 Revised | Budget Total |
|--------------------------------|-------------------------------|--------------------|-------------------------|--------------|
| Fund 141 (General Fund) | \$ 61,154,449.00 | \$ (0.65) | \$ 61,154,448.35 | |
| Fund 142 (Federal) | \$ 4,798,134.00 | | \$ 4,798,134.00 | |
| Fund 143 (Food Service) | \$ 2,508,891.00 | | \$ 2,508,891.00 | |
| Fund 145 (Other Education) | \$ 236,719.00 | \$ 0.65 | \$ 236,719.65 | |
| Fund 146 (Extended Child Care) | \$ 456,651.00 | | \$ 456,651.00 | |
| TOTAL All Funds | \$ 69,154,844.00 | \$ - | \$ 69,154,844.00 | |

Fund 141 Budget Transfers

| Fund 141 REVENUES | Account Number | Decrease | Increase |
|--|-------------------------------|--------------|--------------|
| Adjust grant budget for Pre-K State Grant to Actual Grant Amount | 141 R 46515 000 011 00000 000 | \$ 660.36 | \$ - |
| | 141 R 46980 000 000 00000 000 | \$ - | \$ 660.36 |
| Adjust FRC Grant Budget to Actual Grant Amount (from 141 Contingency) | 141 R 46980 000 000 00000 000 | \$ 0.65 | \$ - |
| Establish Budget for Navy Revenue to Help Fund JROTC Position | 141 R 46980 000 000 00000 000 | \$ 73,772.00 | \$ - |
| | 141 R 47640 000 000 00000 000 | \$ - | \$ 73,772.00 |

| Fund 141 EXPENDITURES | | Account Number | Increase | Decrease |
|--|--|-------------------------------|--------------|--------------|
| Realign Budgeted Amount for Annual Insurance Coverage to Appropriate Account Codes | | 141 E 72310 508 000 00000 000 | \$ 87.00 | \$ - |
| | | 141 E 72710 511 000 00000 000 | \$ 11,366.00 | \$ - |
| | | 141 E 72310 506 000 00000 000 | \$ 16,164.00 | \$ - |
| | | 141 E 72610 502 000 00000 000 | \$ - | \$ 22,586.00 |
| | | 141 E 72610 501 000 00000 000 | \$ - | \$ 2,058.00 |
| | | 141 E 72310 513 000 00000 000 | \$ - | \$ 2,973.00 |
| Adjust Pre-K State Grant Budget to Actual Grant Award Amount | | 141 E 73400 116 011 00043 000 | \$ - | \$ 87,323.00 |
| | | 141 E 73400 116 011 00043 031 | \$ 38,057.00 | \$ - |
| | | 141 E 73400 163 011 00043 000 | \$ 35,313.00 | \$ - |
| | | 141 E 73400 201 011 00000 000 | \$ - | \$ 3,226.00 |
| | | 141 E 73400 201 011 00000 031 | \$ 2,361.00 | \$ - |
| | | 141 E 73400 204 011 00043 000 | \$ - | \$ 5,792.00 |
| | | 141 E 73400 204 011 00043 031 | \$ 4,255.00 | \$ - |
| | | 141 E 73400 206 011 00043 000 | \$ - | \$ 213.00 |
| | | 141 E 73400 206 011 00043 031 | \$ 314.00 | \$ - |
| | | 141 E 73400 207 011 00043 000 | \$ 81.00 | \$ - |
| | | 141 E 73400 207 011 00043 031 | \$ 6,125.00 | \$ - |
| | | 141 E 73400 208 011 00043 000 | \$ - | \$ 618.00 |
| | | 141 E 73400 208 011 00043 031 | \$ 914.00 | \$ - |
| | | 141 E 73400 212 011 00043 000 | \$ - | \$ 759.00 |
| | | 141 E 73400 212 011 00043 031 | \$ 556.00 | \$ - |
| | | 141 E 73400 299 011 00043 000 | \$ 32.00 | \$ - |
| | | 141 E 73400 299 011 00043 031 | \$ 58.00 | \$ - |
| | | 141 E 73400 429 011 00043 000 | \$ 1,704.64 | \$ - |
| | | 141 E 71900 599 000 00000 000 | \$ 660.36 | \$ - |
| | | 141 E 73401 116 000 00043 000 | \$ 7,500.00 | \$ - |
| Adjust FRC Grant Budget to Actual Grant Amount (from 141 Contingency) | | 141 E 71900 599 000 00000 000 | \$ - | \$ 0.65 |

| | | | | | | |
|--|----------------------------------|-------------------------------|----|-----------|----|-----------|
| | | 141 E 72250 105 000 00000 000 | \$ | 7,224.64 | \$ | - |
| | 2 IT Positions Salary Increase & | 141 E 72250 201 000 00000 000 | \$ | 447.93 | \$ | - |
| | Associated Benefits | 141 E 72250 204 000 00000 000 | \$ | 767.98 | \$ | - |
| | | 141 E 72250 212 000 00000 000 | \$ | 104.76 | \$ | - |
| | | 141 E 72610 166 000 00000 000 | \$ | 4,250.00 | \$ | - |
| | 2 Custodial Positions Salary | 141 E 72610 201 000 00000 000 | \$ | 263.50 | \$ | - |
| | Increase & Associated Benefits | 141 E 72610 204 000 00000 000 | \$ | 451.78 | \$ | - |
| | | 141 E 72610 212 000 00000 000 | \$ | 61.63 | \$ | - |
| | | 141 E 71100 116 000 00045 000 | \$ | 37.13 | \$ | - |
| | | 141 E 71100 201 000 00045 000 | \$ | 2.84 | \$ | - |
| | WB Admin Position Salary | 141 E 71100 204 000 00045 000 | \$ | 3.95 | \$ | - |
| | Increase & Associated Benefits | 141 E 72410 139 000 00045 000 | \$ | 37.13 | \$ | - |
| | | 141 E 72410 201 000 00045 000 | \$ | 2.84 | \$ | - |
| | | 141 E 72410 204 000 00045 000 | \$ | 3.95 | \$ | - |
| | | 141 E 72410 139 000 00035 000 | \$ | 4,414.84 | \$ | - |
| | 2 ORHS Admin Positions Salary | 141 E 72410 201 000 00035 000 | \$ | 273.72 | \$ | - |
| | Increase & Associated Benefits | 141 E 72410 204 000 00035 000 | \$ | 469.30 | \$ | - |
| | | 141 E 72410 212 000 00035 000 | \$ | 64.01 | \$ | - |
| | | 141 E 72620 167 000 00000 000 | \$ | 1,942.00 | \$ | - |
| | Maintenance Position Salary | 141 E 72620 201 000 00000 000 | \$ | 120.40 | \$ | - |
| | Increase & Associated Benefits | 141 E 72620 204 000 00000 000 | \$ | 206.43 | \$ | - |
| | | 141 E 72620 212 000 00000 000 | \$ | 28.16 | \$ | - |
| | | 141 E 72410 139 000 00040 000 | \$ | 253.00 | \$ | - |
| | JMS Admin Position Salary | 141 E 72410 201 000 00040 000 | \$ | 15.69 | \$ | - |
| | Increase & Associated Benefits | 141 E 72410 204 000 00040 000 | \$ | 26.89 | \$ | - |
| | | 141 E 72410 212 000 00040 000 | \$ | 3.67 | \$ | - |
| | | 141 E 71300 116 000 00035 000 | \$ | 88,329.00 | \$ | - |
| | Salary & Benefits for Additional | 141 E 71300 201 000 00035 000 | \$ | 5,476.40 | \$ | - |
| | JROTC Position at ORHS | 141 E 71300 204 000 00035 000 | \$ | 9,071.39 | \$ | - |
| | | 141 E 71300 212 000 00035 000 | \$ | 1,280.77 | \$ | - |
| | | 141 E 71300 207 000 00035 000 | \$ | 16,765.80 | \$ | - |
| | | 141 E 71900 599 000 00000 001 | \$ | - | \$ | 68,629.53 |
| | Contingency | 141 E 71900 599 000 00000 000 | \$ | - | \$ | 73,772.00 |

| | | | |
|--|-------------------------------|--------------|--------------|
| Increase Bus Contract for Additional Disinfection | 141 E 72710 312 000 00000 398 | \$ 35,100.00 | \$ - |
| due to COVID-19 - From Contingency | 141 E 71900 599 000 00000 004 | \$ - | \$ 35,100.00 |

| | | | |
|--------------|--|----------------------|----------------------|
| TOTAL | | \$ 377,482.54 | \$ 377,482.54 |
|--------------|--|----------------------|----------------------|

Fund 142 Budget Transfers

| Fund 142 REVENUES | Account Code | Decrease | Increase |
|---|-------------------------------|---------------|---------------|
| Adjust Revenue Budget for Carl Perkins Grant | 142 R 47131 000 801 00000 000 | \$ 1,774.50 | \$ - |
| | 142 R 47590 000 000 00000 000 | \$ - | \$ 1,774.50 |
| Adjust Revenue Budget for Title III Grant | 142 R 47590 000 000 00000 000 | \$ 159.50 | \$ - |
| | 142 R 47146 000 303 00000 000 | \$ - | \$ 159.50 |
| Establish Budget for ESSER Grant | 142 R 47590 000 000 0000 000 | \$ 756,515.31 | \$ - |
| | 142 R 47301 000 931 00000 000 | \$ - | \$ 756,515.31 |

| FUND 142 EXPENDITURES | Increase | Decrease | |
|---|-------------------------------|--------------|--------------|
| Carl Perkins Budget Adjustment to match Eplan Budget | 142 E 71300 163 801 00035 000 | \$ - | \$ 45.50 |
| | 142 E 71300 201 801 00035 000 | \$ - | \$ 1.00 |
| | 142 E 71300 000 000 00000 000 | \$ - | \$ 46,305.50 |
| | 142 E 71300 429 801 00000 000 | \$ 6,000.00 | \$ - |
| | 142 E 71300 499 801 00000 000 | \$ 4,000.00 | \$ - |
| | 142 E 71300 730 801 00000 000 | \$ 23,297.00 | \$ - |
| | 142 E 72130 355 801 00000 000 | \$ 1,500.00 | \$ - |
| | 142 E 72130 399 801 00000 000 | \$ 1,500.00 | \$ - |
| | 142 E 72130 524 801 00000 000 | \$ 4,000.00 | \$ - |
| | 142 E 72230 524 801 00000 000 | \$ 3,500.00 | \$ - |
| | 142 E 99100 504 801 00000 000 | \$ 2,555.00 | \$ - |

| | | | | | |
|--|-------------------------------|----|----------|----|----------|
| | 142 E 71200 163 911 00043 000 | \$ | - | \$ | 1,191.58 |
| | 142 E 71200 201 911 00043 000 | \$ | - | \$ | 98.00 |
| | 142 E 71200 204 911 00043 000 | \$ | - | \$ | 150.20 |
| | 142 E 71200 206 911 00043 000 | \$ | - | \$ | 9.00 |
| | 142 E 71200 208 911 00043 000 | \$ | 320.00 | \$ | - |
| | 142 E 71200 212 911 00043 000 | \$ | 7.00 | \$ | - |
| Establish Budget for IDEA Preschool Grant | 142 E 71200 299 911 00043 000 | \$ | 93.00 | \$ | - |
| | 142 E 71200 725 911 00000 000 | \$ | 5,373.19 | \$ | - |
| | 142 E 99100 504 911 00000 000 | \$ | 1,622.59 | \$ | - |
| | 142 E 72200 000 000 00000 000 | \$ | - | \$ | 2,826.00 |
| | 142 E 72120 000 000 00000 000 | \$ | - | \$ | 23.00 |
| | 142 E 71300 000 000 00000 000 | \$ | - | \$ | 1,774.50 |
| | 142 E 73300 000 000 00000 000 | \$ | - | \$ | 1,343.50 |

| | | | | | |
|---------------------------------------|-------------------------------|----|-----------|----|----------|
| | 142 E 71100 116 101 00043 000 | \$ | - | \$ | 8,069.97 |
| | 142 E 71100 163 101 00015 000 | \$ | 1,212.03 | \$ | - |
| | 142 E 71100 163 101 00030 000 | \$ | 7,198.00 | \$ | - |
| | 142 E 71100 163 101 00043 000 | \$ | 15,520.51 | \$ | - |
| | 142 E 71100 163 101 00045 000 | \$ | - | \$ | 7,522.25 |
| | 142 E 71100 163 101 00050 000 | \$ | - | \$ | 1,975.00 |
| | 142 E 71100 189 101 00015 000 | \$ | 1,000.00 | \$ | - |
| | 142 E 71100 189 101 00030 000 | \$ | 1,000.00 | \$ | - |
| | 142 E 71100 189 101 00045 000 | \$ | 5,000.00 | \$ | - |
| Establish Title I Grant Budget | 142 E 71100 189 101 00050 000 | \$ | 1,000.00 | \$ | - |
| | 142 E 71100 201 101 00015 000 | \$ | 74.54 | \$ | - |
| | 142 E 71100 201 101 00030 000 | \$ | 997.09 | \$ | - |
| | 142 E 71100 201 101 00043 000 | \$ | 634.80 | \$ | - |
| | 142 E 71100 201 101 00045 000 | \$ | - | \$ | 465.78 |
| | 142 E 71100 201 101 00050 000 | \$ | - | \$ | 59.93 |
| | 142 E 71100 204 101 00015 000 | \$ | 913.80 | \$ | - |
| | 142 E 71100 204 101 00043 000 | \$ | 3,961.47 | \$ | - |
| | 142 E 71100 204 101 00045 000 | \$ | 419.16 | \$ | - |
| | 142 E 71100 206 101 00030 000 | \$ | 63.00 | \$ | - |

**Establish Title I Grant Budget
(Cont)**

| | | | | |
|-------------------------------|----|----------|----|-----------|
| 142 E 71100 206 101 00043 000 | \$ | 172.00 | \$ | - |
| 142 E 71100 206 101 00045 000 | \$ | - | \$ | 0.50 |
| 141 E 71100 207 101 00030 000 | \$ | 5,000.00 | \$ | - |
| 142 E 71100 207 101 00043 000 | \$ | 5,109.00 | \$ | - |
| 142 E 71100 207 101 00045 000 | \$ | - | \$ | 2,017.00 |
| 142 E 71100 208 101 00015 000 | \$ | - | \$ | 10.00 |
| 142 E 71100 208 101 00030 000 | \$ | 177.50 | \$ | - |
| 142 E 71100 208 101 00043 000 | \$ | 458.00 | \$ | - |
| 142 E 71100 208 101 00045 000 | \$ | - | \$ | 13.25 |
| 142 E 71100 212 101 00015 000 | \$ | 39.17 | \$ | - |
| 142 E 71100 212 101 00030 000 | \$ | 106.05 | \$ | - |
| 142 E 71100 212 101 00043 000 | \$ | 143.34 | \$ | - |
| 142 E 71100 212 101 00045 000 | \$ | - | \$ | 41.71 |
| 142 E 71100 212 101 00050 000 | \$ | 3.21 | \$ | - |
| 142 E 71100 217 101 00045 000 | \$ | - | \$ | 389.00 |
| 142 E 71100 299 101 00015 000 | \$ | - | \$ | 6.00 |
| 142 E 71100 299 101 00030 000 | \$ | 51.65 | \$ | - |
| 142 E 71100 299 101 00043 000 | \$ | 120.80 | \$ | - |
| 142 E 71100 299 101 00045 000 | \$ | - | \$ | 5.87 |
| 142 E 71100 429 101 00015 000 | \$ | 2,000.00 | \$ | - |
| 142 E 71100 429 101 00030 000 | \$ | 2,000.00 | \$ | - |
| 142 E 71100 429 101 00045 000 | \$ | 2,000.00 | \$ | - |
| 142 E 71100 429 101 00050 000 | \$ | 2,000.00 | \$ | - |
| 142 E 72130 189 101 00000 000 | \$ | 1.48 | \$ | - |
| 142 E 72130 201 101 00000 000 | \$ | 0.24 | \$ | - |
| 142 E 72130 204 101 00000 000 | \$ | 31.84 | \$ | - |
| 142 E 72130 207 101 00000 000 | \$ | - | \$ | 15,642.00 |
| 142 E 72130 208 101 00000 000 | \$ | - | \$ | 187.50 |
| 142 E 72130 212 101 00000 000 | \$ | 0.23 | \$ | - |
| 142 E 72130 299 101 00000 000 | \$ | - | \$ | 109.00 |
| 142 E 72130 499 101 00015 000 | \$ | 200.00 | \$ | - |
| 142 E 72130 499 101 00030 000 | \$ | 200.00 | \$ | - |
| 142 E 72130 499 101 00045 000 | \$ | 200.00 | \$ | - |
| 142 E 72130 499 101 00050 000 | \$ | 200.00 | \$ | - |

**Establish Title I Grant Budget
(Cont)**

| | | | | |
|-------------------------------|----|-----------|----|-----------|
| 142 E 72130 599 101 00000 000 | \$ | 30,410.86 | \$ | - |
| 142 E 72210 189 101 00045 000 | \$ | 0.16 | \$ | - |
| 142 E 72210 189 101 00000 000 | \$ | - | \$ | 0.43 |
| 142 E 72210 201 101 00045 000 | \$ | - | \$ | 0.32 |
| 142 E 72210 201 101 00000 000 | \$ | - | \$ | 0.81 |
| 142 E 72210 204 101 00045 000 | \$ | 38.32 | \$ | - |
| 142 E 72210 204 101 00000 000 | \$ | 106.98 | \$ | - |
| 142 E 72210 206 101 00045 000 | \$ | - | \$ | 0.50 |
| 142 E 72210 206 101 00000 000 | \$ | - | \$ | 0.50 |
| 142 E 72210 207 101 00000 000 | \$ | - | \$ | 4,451.00 |
| 142 E 72210 207 101 00045 000 | \$ | - | \$ | 295.20 |
| 142 E 72210 208 101 00045 000 | \$ | - | \$ | 2.20 |
| 142 E 72210 208 101 00000 000 | \$ | - | \$ | 96.50 |
| 142 E 72210 212 101 00045 000 | \$ | 0.01 | \$ | - |
| 142 E 72210 212 101 00000 000 | \$ | 0.49 | \$ | - |
| 142 E 72210 299 101 00000 000 | \$ | - | \$ | 2.35 |
| 142 E 72210 299 101 00045 000 | \$ | - | \$ | 1.16 |
| 142 E 72210 524 101 00045 000 | \$ | 8,000.00 | \$ | - |
| 142 E 72210 524 101 00015 000 | \$ | 3,000.00 | \$ | - |
| 142 E 72210 524 101 00030 000 | \$ | 1,000.00 | \$ | - |
| 142 E 72210 524 101 00050 000 | \$ | 12,000.00 | \$ | - |
| 142 E 72210 524 101 00000 000 | \$ | 16,500.00 | \$ | - |
| 142 E 72710 399 101 00045 000 | \$ | 3,000.00 | \$ | - |
| 142 E 72710 399 101 00015 000 | \$ | 3,000.00 | \$ | - |
| 142 E 72710 399 101 00030 000 | \$ | 3,000.00 | \$ | - |
| 142 E 72710 399 101 00050 000 | \$ | 3,000.00 | \$ | - |
| 142 E 99100 504 101 00000 000 | \$ | 51,500.00 | \$ | - |
| 142 E 71100 000 000 00000 000 | \$ | - | \$ | 84,474.00 |
| 141 E 72710 000 000 00000 000 | \$ | - | \$ | 25,000.00 |
| 142 E 72130 000 000 00000 000 | \$ | - | \$ | 1,610.50 |
| 142 E 99100 000 000 00000 000 | \$ | - | \$ | 41,315.50 |

| | | | | | |
|--|-------------------------------|----|-----------|----|-----------|
| | 142 E 72120 189 411 00000 000 | \$ | - | \$ | 434.00 |
| | 142 E 72120 201 411 00000 000 | \$ | - | \$ | 26.00 |
| | 142 E 72120 204 411 00000 000 | \$ | 327.00 | \$ | - |
| | 142 E 72120 206 411 00000 000 | \$ | 3.00 | \$ | - |
| | 142 E 72120 208 411 00000 000 | \$ | 9.00 | \$ | - |
| | 142 E 72120 212 411 00000 000 | \$ | 20.00 | \$ | - |
| | 142 E 72120 217 411 00000 000 | \$ | - | \$ | 121.00 |
| | 142 E 72120 299 411 00000 000 | \$ | 23.00 | \$ | - |
| | 142 E 72130 322 411 00000 000 | \$ | 5,000.00 | \$ | - |
| | 142 E 72210 196 411 00000 000 | \$ | 10,049.36 | \$ | - |
| Establish Title IV Grant Budget | 142 E 72210 201 411 00000 000 | \$ | 800.00 | \$ | - |
| | 142 E 72210 204 411 00000 000 | \$ | 1,300.00 | \$ | - |
| | 142 E 72210 212 411 00000 000 | \$ | 200.00 | \$ | - |
| | 142 E 72210 524 411 00000 000 | \$ | 5,000.00 | \$ | - |
| | 142 E 72210 399 411 00000 000 | \$ | 5,000.00 | \$ | - |
| | 142 E 72210 399 411 00008 000 | \$ | 2,267.08 | \$ | - |
| | 142 E 72210 499 411 00000 000 | \$ | 5,000.00 | \$ | - |
| | 142 E 72210 599 411 00000 000 | \$ | 5,500.00 | \$ | - |
| | 142 E 72250 524 411 00000 000 | \$ | 8,000.00 | \$ | - |
| | 142 E 99100 504 411 00000 000 | \$ | 3,802.56 | \$ | - |
| | 142 E 72210 000 000 00000 000 | \$ | - | \$ | 48,927.50 |
| | 142 E 72130 000 000 00000 000 | \$ | - | \$ | 2,792.50 |

| | | | | | |
|-------------------------------------|-------------------------------|----|------------|----|---|
| | 142 E 71100 195 931 00000 000 | \$ | 42,000.00 | \$ | - |
| | 142 E 71100 210 931 00000 000 | \$ | 2,604.00 | \$ | - |
| | 142 E 71100 212 931 00000 000 | \$ | 609.00 | \$ | - |
| | 142 E 71100 399 931 00000 000 | \$ | 20,000.00 | \$ | - |
| Establish ESSER Grant Budget | 142 E 71100 429 931 00008 000 | \$ | 500.00 | \$ | - |
| | 142 E 71100 471 931 00000 000 | \$ | 175,000.00 | \$ | - |
| | 142 E 71100 471 931 00008 000 | \$ | 1,800.00 | \$ | - |
| | 142 E 72210 196 931 00000 000 | \$ | 42,000.00 | \$ | - |
| | 142 E 72210 201 931 00000 000 | \$ | 2,604.00 | \$ | - |
| | 142 E 72210 204 931 00000 000 | \$ | 4,313.40 | \$ | - |

| | | | | | |
|--|-------------------------------|----|------------|----|------------|
| Establish ESSER Grant Budget (Cont) | 142 E 72210 212 931 00000 000 | \$ | 609.00 | \$ | - |
| | 142 E 72210 499 931 00000 000 | \$ | 25,000.00 | \$ | - |
| | 142 E 72210 524 931 00000 000 | \$ | 41,697.17 | \$ | - |
| | 142 E 72250 790 931 00000 000 | \$ | 325,000.00 | \$ | - |
| | 142 E 72250 790 931 00008 000 | \$ | 2,245.74 | \$ | - |
| | 142 E 72610 720 931 00000 000 | \$ | 20,533.00 | \$ | - |
| | 142 E 99100 504 931 00000 000 | \$ | 50,000.00 | \$ | - |
| | 142 E 71900 000 000 00000 000 | \$ | - | \$ | 756,515.31 |

| | | | | | |
|---|-------------------------------|----|----------|----|-----------|
| Establish Title III Grant Budget | 142 E 72210 499 303 00000 000 | \$ | 5,000.00 | \$ | - |
| | 142 E 72210 499 303 00008 000 | \$ | 2,451.96 | \$ | - |
| | 142 E 72210 524 303 00000 000 | \$ | 9,230.64 | \$ | - |
| | 142 E 99100 504 303 00000 000 | \$ | 948.90 | \$ | - |
| | 142 E 72210 000 000 00000 000 | \$ | - | \$ | 17,631.50 |

| | | | | | |
|---|-------------------------------|----|-----------|----|------------|
| Establish Title IIA Grant Budget | 142 E 72210 189 202 00000 000 | \$ | 1,586.00 | \$ | - |
| | 142 E 72210 196 202 00000 000 | \$ | 15,000.00 | \$ | - |
| | 142 E 72210 201 202 00000 000 | \$ | 1,028.00 | \$ | - |
| | 142 E 72210 204 202 00000 000 | \$ | 1,617.80 | \$ | - |
| | 142 E 72210 206 202 00000 000 | \$ | 168.00 | \$ | - |
| | 142 E 72210 207 202 00000 000 | \$ | 367.00 | \$ | - |
| | 142 E 72210 208 202 00000 000 | \$ | 59.00 | \$ | - |
| | 142 E 72210 212 202 00000 000 | \$ | 247.00 | \$ | - |
| | 142 E 72210 299 202 00000 000 | \$ | 48.00 | \$ | - |
| | 142 E 72210 399 202 00000 000 | \$ | 55,000.00 | \$ | - |
| | 142 E 72210 524 202 00000 000 | \$ | 43,083.31 | \$ | - |
| | 142 E 72210 524 202 00008 000 | \$ | 5,182.57 | \$ | - |
| | 142 E 99100 504 202 00000 000 | \$ | 6,079.32 | \$ | - |
| | 142 E 72210 000 000 00000 000 | \$ | - | \$ | 129,466.00 |

| | | | | | |
|--|-------------------------------|----|-----------|----|------------|
| | 142 E 73300 105 431 00015 000 | \$ | 11,000.00 | \$ | - |
| | 142 E 73300 105 431 00045 000 | \$ | 11,700.01 | \$ | - |
| | 142 E 73300 116 431 00015 000 | \$ | 26,420.00 | \$ | - |
| | 142 E 73300 116 431 00045 000 | \$ | 6,150.00 | \$ | - |
| | 142 E 73300 162 431 00015 000 | \$ | 1,800.00 | \$ | - |
| | 142 E 73300 169 431 00015 000 | \$ | 3,840.00 | \$ | - |
| | 142 E 73300 169 431 00045 000 | \$ | 7,680.00 | \$ | - |
| | 142 E 73300 189 431 00015 000 | \$ | 7,340.00 | \$ | - |
| | 142 E 73300 189 431 00045 000 | \$ | 23,385.00 | \$ | - |
| | 142 E 73300 201 431 00015 000 | \$ | 3,488.00 | \$ | - |
| | 142 E 73300 201 431 00045 000 | \$ | 3,395.42 | \$ | - |
| | 142 E 73300 204 431 00015 000 | \$ | 5,241.00 | \$ | - |
| | 142 E 73300 204 431 00045 000 | \$ | 4,172.84 | \$ | - |
| Establish 21st Century Grant Budget | 142 E 73300 212 431 00015 000 | \$ | 731.00 | \$ | - |
| | 142 E 73300 212 431 00045 000 | \$ | 709.09 | \$ | - |
| | 142 E 73300 399 431 00015 000 | \$ | 3,470.00 | \$ | - |
| | 142 E 73300 399 431 00045 000 | \$ | 4,615.88 | \$ | - |
| | 142 E 73300 429 431 00015 000 | \$ | 328.75 | \$ | - |
| | 142 E 73300 429 431 00045 000 | \$ | 1,935.51 | \$ | - |
| | 142 E 73300 524 431 00015 000 | \$ | 600.00 | \$ | - |
| | 142 E 73300 524 431 00045 000 | \$ | 600.00 | \$ | - |
| | 142 E 73300 599 431 00015 000 | \$ | 1,540.00 | \$ | - |
| | 142 E 73300 599 431 00045 000 | \$ | 1,455.00 | \$ | - |
| | 142 E 99100 504 431 00015 000 | \$ | 4,578.75 | \$ | - |
| | 142 E 99100 504 431 00045 000 | \$ | 4,578.75 | \$ | - |
| | 142 E 73300 000 000 00000 000 | \$ | - | \$ | 140,755.00 |

| | | | | | |
|--------------|--|--|------------------------|------------------------|--|
| TOTAL | | | \$ 2,102,651.63 | \$ 2,102,651.63 | |
|--------------|--|--|------------------------|------------------------|--|

Fund 145 Budget Transfers

| Fund 145 REVENUES | Account Code | Decrease | Increase |
|--|-------------------------------|----------------|----------------|
| Adjust FRC Grant Budget to Actual Grant Amount (from 141 Contingency) | 145 R 46590 000 048 00000 000 | \$ - | \$ 0.65 |
| | | | |
| Fund 145 EXPENDITURES | Account Code | Increase | Decrease |
| Adjust FRC Grant Budget to Actual Grant Amount (from 141 Contingency) | 145 E 72130 189 048 00000 000 | \$ 0.65 | \$ - |
| | | | |
| TOTAL | | \$ 0.65 | \$ 0.65 |

ATTACHMENT B**GRANT BUDGET****GRANTEE****OAK RIDGE SCHOOLS****PROGRAM AREA:****[Family Resource Center 2020-2021]**

Refer to Department of Finance and Administration Policy 03, Uniform Reporting Requirements and Cost Allocation Plans for Subrecipients of Federal and State Grant Monies, Appendix A for further definition of each expense object line-item in the model budget format. Policy 03 can be found on the Internet at: <http://www.state.tn.us/finance/rds/ocr/policy03.pdf>

THE FOLLOWING IS APPLICABLE TO EXPENSE INCURRED IN THE PERIOD: [07/01/20] through [06/30/21]

| POLICY 03 Object Line-item Reference | EXPENSE OBJECT LINE-ITEM CATEGORY (detail schedule(s) attached as applicable) | GRANT CONTRACT | GRANTEE MATCH (participation) | TOTAL PROJECT |
|---|--|--------------------|----------------------------------|---------------------|
| 1 | Salaries | \$24,018.65 | \$62,647.35 | \$86,666.00 |
| 2 | Benefits & Taxes % | \$0.00 | \$20,531.00 | \$20,531.00 |
| 4, 15 | Professional Fees / Grant Awards (detail attached) | \$0.00 | \$0.00 | \$0.00 |
| 5 | Supplies | \$3,093.00 | \$0.00 | \$3,093.00 |
| 6 | Telephone | \$0.00 | \$0.00 | \$0.00 |
| 7 | Postage & Shipping | \$500.00 | \$0.00 | \$500.00 |
| 8 | Occupancy | \$0.00 | \$0.00 | \$0.00 |
| 9 | Equipment Rental & Maintenance | \$0.00 | \$0.00 | \$0.00 |
| 10 | Printing & Publications | \$0.00 | \$0.00 | \$0.00 |
| 11, 12 | Travel / Conferences & Meetings | \$2,000.00 | \$0.00 | \$2,000.00 |
| 13 | Interest (detail attached) | \$0.00 | \$0.00 | \$0.00 |
| 14 | Insurance | \$0.00 | \$0.00 | \$0.00 |
| 16 | Specific Assistance to Individuals | \$0.00 | \$0.00 | \$0.00 |
| 17 | Depreciation (detail attached) | \$0.00 | \$0.00 | \$0.00 |
| 18 | Other Non-Personnel (detail attached) | \$0.00 | \$0.00 | \$0.00 |
| 20 | Capital Purchase (detail attached) | \$0.00 | \$0.00 | \$0.00 |
| 22 | Indirect Cost [] | \$0.00 | \$0.00 | \$0.00 |
| 24 | In-Kind Expense | \$0.00 | \$0.00 | \$0.00 |
| 25 | GRAND TOTAL | \$29,611.65 | \$83,178.35 | \$112,790.00 |

GRANT BUDGET DETAIL

| LINE-ITEM DETAIL FOR: [PROFESSIONAL FEE/ GRANT & AWARD] | AMOUNT |
|--|---------------|
| [SPECIFIC, DESCRIPTIVE, DETAIL (REPEAT LINE AS NECESSARY)] | \$0.00 |
| [SPECIFIC, DESCRIPTIVE, DETAIL (REPEAT LINE AS NECESSARY)] | \$0.00 |
| TOTAL | \$0.00 |

| LINE-ITEM DETAIL FOR: [INTEREST] | AMOUNT |
|--|---------------|
| [SPECIFIC, DESCRIPTIVE, DETAIL (REPEAT LINE AS NECESSARY)] | \$0.00 |
| [SPECIFIC, DESCRIPTIVE, DETAIL (REPEAT LINE AS NECESSARY)] | \$0.00 |
| TOTAL | \$0.00 |

| LINE-ITEM DETAIL FOR: [DEPRECIATION] | AMOUNT |
|--|---------------|
| [SPECIFIC, DESCRIPTIVE, DETAIL (REPEAT LINE AS NECESSARY)] | \$0.00 |
| [SPECIFIC, DESCRIPTIVE, DETAIL (REPEAT LINE AS NECESSARY)] | \$0.00 |
| TOTAL | \$0.00 |

| LINE-ITEM DETAIL FOR: [OTHER NON-PERSONNEL] | AMOUNT |
|--|---------------|
| | \$0.00 |
| | \$0.00 |
| TOTAL | \$0.00 |

| LINE-ITEM DETAIL FOR: [CAPITAL PURCHASE] | AMOUNT |
|--|---------------|
| | \$0.00 |
| [SPECIFIC, DESCRIPTIVE, DETAIL (REPEAT LINE AS NECESSARY)] | \$0.00 |
| TOTAL | \$0.00 |

| LINE-ITEM DETAIL FOR: [SUBJECT LINE-ITEM] | AMOUNT |
|--|---------------|
| [SPECIFIC, DESCRIPTIVE, DETAIL (REPEAT LINE AS NECESSARY)] | \$0.00 |
| [SPECIFIC, DESCRIPTIVE, DETAIL (REPEAT LINE AS NECESSARY)] | \$0.00 |
| TOTAL | \$0.00 |

In accordance with T.C.A. § 49-2-115 and Family Resource Center (FRC) guidelines, FRC centers funded through state grant allocations or financed by funds budgeted by local education agencies from the system’s allotted Basic Education Program (BEP) must provide an annual performance report which verifies that each FRC is operating as specified in T.C.A. § 49-2-115. Each section of the report **must** be completed unless otherwise noted. **Report documents will be submitted in ePlan.** The instructions for submission are listed at the end of the report.

| | | |
|--|--------------|-------------|
| District: | | |
| Director of Schools: | | |
| FRC Supervisor (if not director): | | |
| FRC Director: | | |
| Email Address: | | |
| FRC Site Address: | | |
| Phone: | | |
| Position Staffing: <input type="checkbox"/> 10 months <input type="checkbox"/> 11 months <input type="checkbox"/> 12 months | | |
| List additional school/district duties/responsibilities: | | |
| List additional sources of funding for FRC staff position: | | |
| Program Level: Check all that apply. <input type="checkbox"/> Elementary (Pre-K-5) <input type="checkbox"/> Middle (6-8) <input type="checkbox"/> High (9-12) <input type="checkbox"/> Family Members | | |
| No. of unduplicated students/children served: _____ No. of families served: _____ | | |
| Additional FRC Sites (if multiple sites per district): | | |
| Site | Site Address | Grade Level |
| | | |
| | | |
| | | |
| | | |

Select each service/activity provided:

| DS / R | | DS / R | |
|--------|--|--|--|
| | | <i>Alcohol, Drug & Violence</i> | <i>Juvenile Court Affiliation</i> |
| | | <i>Attendance/Truancy</i> | <i>Job Readiness/Job Training</i> |
| | | <i>Behavioral Health Services</i> | <i>Nutrition</i> |
| | | <i>Case Management</i> | <i>Parents as Teachers</i> |
| | | <i>Conflict Resolution and Peer Mediation</i> | <i>Parenting Skills</i> |
| | | <i>Clothing Bank Development</i> | <i>Parenting & Early Childhood</i> |
| | | <i>Early Childhood Development Adolescents</i> | <i>Parenting Skills for Destructive</i> |
| | | <i>Family Literacy</i> | <i>Parent Lending Library</i> |
| | | <i>Families First Affiliation</i> | <i>Preschool in a Bag</i> |
| | | <i>Food Bank</i> | <i>Resource Directory</i> |
| | | <i>Food Backpacks for at-risk students</i> | <i>School Supplies</i> |
| | | <i>GED/Adult Basic Education</i> | <i>Student Hygiene Supplies</i> |
| | | <i>Health</i> | <i>Tutoring/Mentoring</i> |
| | | <i>Health Fair</i> | <i>Teen Parents' Program</i> |
| | | <i>Home Visits</i> | <i>Teen Parents Program Home Visits</i> |
| | | <i>Housing Assistance</i> | <i>Teen Parents Program Housing Assistance</i> |
| | | <i>Other, please list:</i> | |

****Service/Activity Code**

- **Direct Services - DS**
- **Referral - R**

Section I a. Partnerships/Collaborations (Required)

List the civic groups, churches, community agencies, etc. that the FRC partnered/collaborated with during the year along with the type of service or donation provided and an estimated monetary value. **Example: \$23 per hour for volunteer hours, \$160 an hour counseling services, and \$100 donation from Rotary. Grants should be listed here as well.**

| |
|--|
| |
|--|

Section I b. Emergency Response Efforts (optional)

Describe how the FRC mobilized resources for students and families in response to COVID-19, natural disasters or other emergency relief efforts. Include the **estimated** monetary value of contributions received, number of families served, and the number of volunteer hours. In the narrative box, describe the types of contributions received and the process for distributing resources to families.

Value of contributions:

Number of families served:

Number of volunteer hours:

Section II. Professional Development

List the professional development opportunities the FRC director **participated in or will participate in** for the 2019-20 school year. List the professional development opportunities the FRC **provided or will provide** for the district.

[Empty box for listing professional development opportunities]

Section III. FRC Programming

Provide information on each of the goals and objectives for the FRC along with examples of activities and services provided, outcomes, evaluation method, use of data for improvement, and how results were communicated to either the district or the community.

SMART (Specific Measurable Attainable Realistic Timely) Goal Attendance/Truancy: What was the SMART Goal for this domain?

Objective(s): What were the objective(s) for achieving this goal?

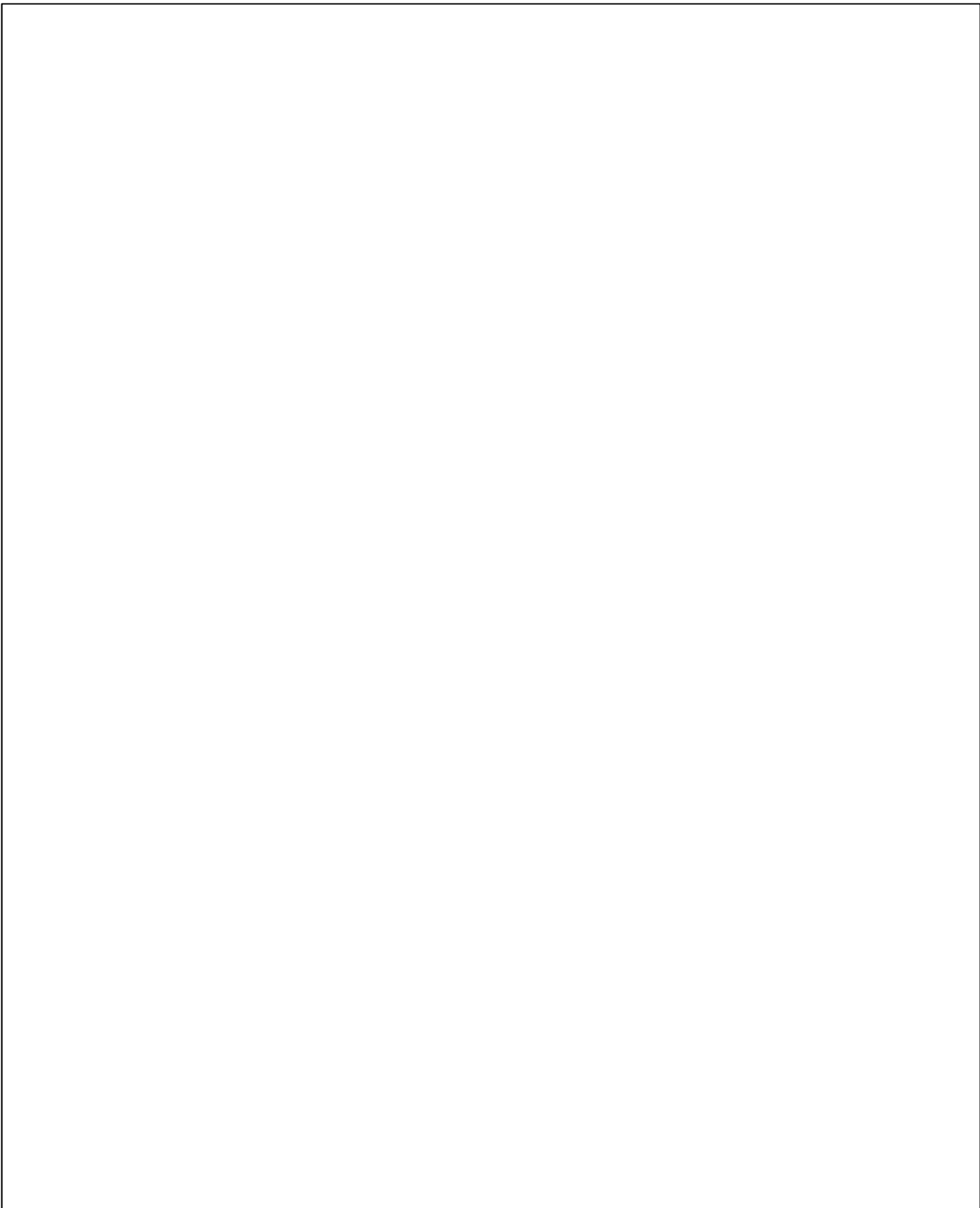
Activities: List activities, curricula, program services, strategies, and policies implemented for this goal including number of students and families served. List any partners involved with the activities/services provided and their specific role.

Outcomes: It is **required** to list outcomes for the goal. Include: 1) what methods were used to measure progress towards the goal; 2) what specific data was collected (i.e., grades, attendance, discipline, formative assessments, etc.); 3) what were the barriers to implementation? 4) how are the outcomes being used to make changes to the program/service; and, 5) how were results communicated to key stakeholders such as parents, students, and the school community?

SMART Goal Behavioral Health: What was the SMART goal for this domain?

Objective(s): What were the objective(s) for achieving this goal?

Activities: List activities, curricula, program services, strategies, and policies implemented for this goal including number of students and families served. List any partners involved with the activities/services provided and their specific role.



Outcomes: It is **required** to list outcomes for the goal. Include: 1) what methods were used to measure progress towards the goal; 2) what specific data was collected (i.e., grades, attendance, discipline, formative assessments, etc.); 3) how were the outcomes used to make changes to the program/service; and, 4) how were results communicated to key stakeholders such as parents, students, and the school community?

SMART Goal Family Support: What was the SMART goal for this domain?

Objective(s): What were the objective(s) for achieving this goal?

Activities: List activities, curricula, program services, strategies, and policies implemented for this goal including number of students and families served. List any partners involved with the activities/services provided and their specific role.

Outcomes: It is **required** to list outcomes for the goal. Include: 1) what methods were used to measure progress towards the goal; 2) what specific data was collected (i.e., grades, attendance, discipline, formative assessments, etc.); 3) how were the outcomes used to make changes to the program/service; and, 4) how were results communicated to key stakeholders such as parents, students, and the school community?

SMART Goal Family Training: What is the SMART goal for this domain?

Objective(s): What were the objective(s) for achieving this goal?

Activities: List activities, curricula, program services, strategies, and policies implemented for this goal including number of students and families served. List any partners involved with the activities/services provided and their specific role.

Outcomes: It is **required** to list outcomes for the goal. Include: 1) what methods were used to measure progress towards the goal; 2) what specific data was collected (i.e., grades, attendance, discipline, formative assessments, etc.); 3) how were the outcomes used to make changes to the program/service; and, 4) how were results communicated to key stakeholders such as parents, students, and the school community?

SMART Goal Family Engagement: What is the SMART goal for this domain?

Objective(s): What were the objective(s) for achieving this goal?

Activities: List activities, curricula, program services, strategies, and policies implemented for this goal including number of students and families served. List any partners involved with the activities/services provided and their specific role.

Outcomes: It is **required** to list outcomes for the goal. Include: 1) what methods were used to measure progress towards the goal; 2) what specific data was collected (i.e., grades, attendance, discipline, formative assessments, etc.); 3) how were the outcomes used to make changes to the program/service; and, 4) how were results communicated to key stakeholders such as parents, students, and the school community?

SMART Goal Academic Support: What is the SMART goal for this domain?

Objective(s): What were the objective(s) for achieving this goal?

Activities: List activities, curricula, program services, strategies, and policies implemented for this goal including number of students and families served. List any partners involved with the activities/services provided and their specific role.

Outcomes: It is **required** to list outcomes for the goal. Include: 1) what methods were used to measure progress towards the goal; 2) what specific data was collected (i.e., grades, attendance, discipline, formative assessments, etc.); 3) how were the outcomes used to make changes to the program/service; and, 4) how were results communicated to key stakeholders such as parents, students, and the school community?

SMART Goal Collaboration/Partnerships: What is the SMART goal for this domain?

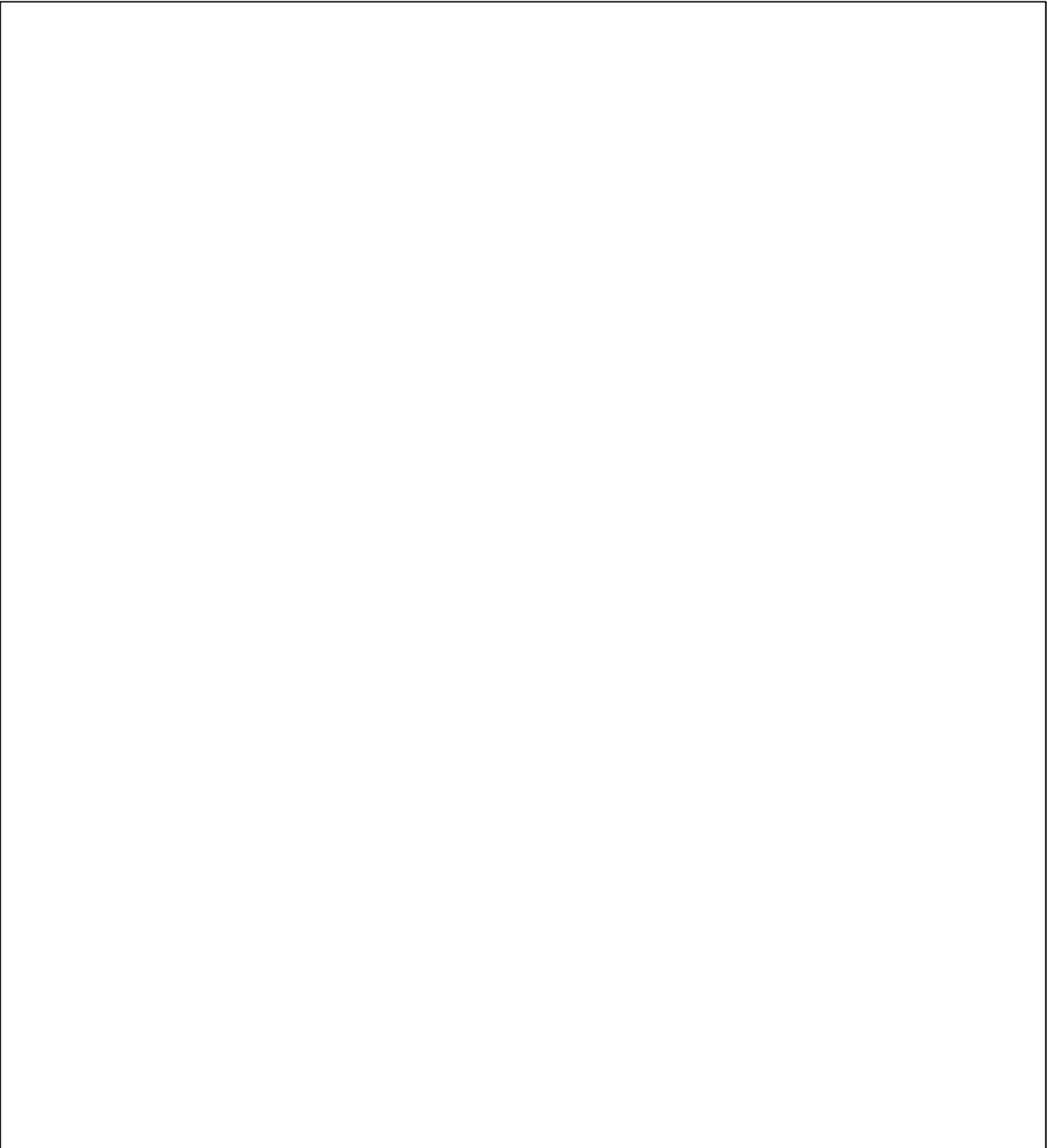
Objective(s): What were the objective(s) for achieving this goal?

Activities: List activities, curricula, program services, strategies, and policies implemented for this goal including number of students and families served. List any partners involved with the activities/services provided and their specific role.

Outcomes: It is **required** to list outcomes for the goal. Include: 1) what methods were used to measure progress towards the goal; 2) what specific data was collected (i.e., grades, attendance, discipline, formative assessments, etc.); 3) how were the outcomes used to make changes to the program/service; and, 4) how were results communicated to key stakeholders such as parents, students, and the school community?

Section IV: Anecdotal Stories

Please use the space below to relate success stories on program best practices, testimonies from students/families, personal testimonies, etc. Information from this section may be featured in Tennessee Department of Education publications.

A large, empty rectangular box with a thin black border, intended for writing anecdotal stories. It occupies the majority of the page below the introductory text.



Section V: Fiscal Management

Please check yes or no to answer each question.

1. Funds are drawn down from ePlan regularly (once per month or quarterly) in correlation to expenditures.

Yes No

2. Budget and accounting records (i.e. account analysis, general ledger sheet for reimbursement requests) align with approved funding application, and reflect the approved line items and amounts. Refer to ePlan for reimbursement documentation.

Yes No

3. Budget revisions are submitted in ePlan and approved prior to obligating the funds.

Yes No

SMART Goals

On the *2020–21 SMART Goals Form* list the FRC goal(s), needs/gaps, objectives, activities, partner's role, and outcomes under each of the following domains.

***Please note that it is not required there be a goal for each of the domains.**

- Attendance/Truancy (i.e., juvenile court, calls to families, district truancy board)
- Behavioral Health (i.e., support groups, counseling, social and emotional learning)
- Family Support (i.e., food backpacks, clothes closet, school supplies)
- Family Training (i.e., parenting classes, nutrition classes, ESL for parents)
- Family Engagement (i.e., family fun night, newsletter, parent meetings)
- Academic Support (i.e., tutoring, reading buddy program, summer enrichment)
- Partnerships/Collaborations (i.e., civic groups, businesses, grants, individuals)

APR Submission Instructions

Submit the *APR report* and *2020–21 SMART Goals Form* in [ePlan](#). The instructions are listed below:

- ✓ Log into ePlan
- ✓ From the left side tool bar select *LEA Documents Library*
- ✓ Click on 2020 to open the folder
- ✓ Scroll down to *Family Resource Centers Annual Report, Documents*
- ✓ Click edit documents
 - If you need to download a copy of the template from ePlan
 - Download the template from the "*Documents/Links*" section
 - Save the template to your computer to complete your report
- ✓ Click [upload documents](#)
- ✓ Name the file to be uploaded
- ✓ Click choose file to select the file from your computer
- ✓ Add a document description - Annual Performance Report
- ✓ Click save and the document will be added
- ✓ Repeat steps to add the outcomes data form and SMART goals form

**Family Resource Center
Key Points of Interest for BOE
2019/20 School Year**

- ❖ The FRC began in 1993 with 13 centers. The Oak Ridge Schools was one of the original centers. The director has been with the program since the conception of the program. We added a part time staff member eleven years ago to operate the satellite office at Glenwood. This has allowed us to meet the needs of students and families though out the Oak Ridge community. This is our 26th year of service. The mission of the Family Resource Center is to break down barriers to a child's educational success and to eliminate problems that keep families from becoming fully functioning and independent members of our community. A volunteer board of at least 50% parents (per grant requirement) governs the FRC. The FRC met all grant requirements for the 2019/20 school year.
- ❖ The center served 821 unduplicated families affecting 1,643 children. Many families received multiple services.
- ❖ The number of donations and in kind services the FRC received to benefit our ORS children and families this school year totaled \$214,883.72 and a total of 3,410 volunteer hours were logged which is equivalent to \$86,703.98 for a sub-total of 301,587.70. Covid-19 donations and in-kind services totaled \$41,537.00 and 777 volunteer hours were logged which equals \$19,759.04 for a total Covid-19 donation amount of \$61,296.04. The grand total of donations, in-kind services and volunteer hours for this year was **\$362,883.74**.
- ❖ During the 2019/20 school year, the FRC provided case management to 82 families. We provided direct emergency assistance to 76 families by utilizing donations made to the FRC. The barriers that our families encountered ranged from homelessness and job loss, medical needs and attendance issues to assistance accessing community resources and navigating the social services systems.
- ❖ The FRC networked with over 200 professional, medical and social service providers to meet the needs of children and families. Over 750 referrals were made through the information and referral process to meet each family's individual needs.
- ❖ FRC collaborated with ADFAC to provide school supplies to 260 WB and GW children and served as a resource for other Oak Ridge schools to identify students in need of school supplies. FRC director is presently serving on the ADFAC Board of Directors and sits on the School Supply committee.
- ❖ The FRC partnered with Second Harvest and the First United Methodist Church of Oak Ridge to provide food each week through the *Backpack Food 4 Kids* program for 643 children in the Oak Ridge Schools by utilizing monthly volunteers to pack and deliver packed food bags to all OR schools.

- ❖ Partnership in the form of a \$2,317.17 gift card from Rack Room Shoes to purchase shoes for children throughout the year. We also received 100 new coats from the Oak Ridge Firefighters Association.
- ❖ The FRC served 835 children at Christmas. The center coordinated the Angel Tree project system-wide by utilizing 34 community partners, 44 generous individual sponsors and multiple private donations.
- ❖ The FRC coordinated efforts to provide 288 families with Thanksgiving meals, 37 families with Easter food baskets and 19 families with summer food baskets.
- ❖ Food insufficiency is also a concern for the families the center serves. During our school closure, the concerns grew exponentially. By utilizing community volunteers, the FRC participated in the school summer food project and delivered daily summer meals to 117 children. Also organized and supervised a volunteer base called the Food Angels that purchased and delivered food to families during crisis and also partnered with local food pantries and churches to make sure families had access to food.
- ❖ Through a United Way grant to Legal Aid of Middle Tennessee and the Cumberland, families identified through the FRC are able to receive legal well checks. We made nine referrals this school year. These referrals allowed our children and families to resolve issues that were preventing them from being contributing independent members of our community.
- ❖ We Love Our WB Families, Family Thanksgiving lunch, Family Reading Night, Kindergarten Parent Night, Student Led Conferences, and Math, Science and STEM nights are examples of creative events designed to increase parent involvement at our four elementary schools. The FRC also increased the variety and number of FRC Facebook posts to increase family engagement. The data pulled showed a 10% increase in the number of visitors to the page.
- ❖ FRC director has assisted /mentored students that have struggled with their behavior and /or classwork in their homeroom classes and offered parenting support to their families. This is an opportunity to problem solve with students and assist them in being successful in the classroom. As a member of the WB leadership team, the FRC participates in PBIS data team and provides Tier 2 Behavior RTI strategies such as BEARS check in/check out program. FRC director served as a liaison to Helen Ross McNabb Center therapist assigned to Willow Brook. This program served 40 students this school year. Therapist also collaborated with WB on family activities.
- ❖ The FRC enlisted the assistance of 39 individual/small group reading tutors to support the *Readers and Leaders* program at Willow Brook. Also continued our partnership with First Presbyterian Church to offer the Educate a Child program where volunteers were also matched with grade level teachers and students. We also partnered with the Oak Ridge Rotarians to begin an after school program called Rocket into Reading where volunteers were reading buddies with 3rd grade students. These individual tutors logged a total of 749.5 hours of reading with students this

school year. Eleven volunteers also assisted children weekly in WB's classrooms. During the pandemic many volunteers found creative ways to connect to their students utilizing the FRC as the connector between tutor and student. They dropped off books and letters to have delivered. When approved by the parent they also called and co-read with students. A few tutors even arranged Zoom meetings with their students after FRC worked with parent for permission and also to educate the parent on Zoom.

- ❖ Attendance continued to be an important component of the FRC. The director served on the WB attendance team. WB had 45 students with 5 or more absences this school year but only 6 were referred to the ORS Truancy Review Team and there were zero referrals to ACJC. While school ended in March the data trends supported that we would have been able to meet the state's goal for chronic absenteeism as well. When we left we were slightly above 10% due to the flu season and we were unable to put interventions in place for these students. We will share this updated data with the school's parent involvement committee and the FRC Advisory Council regarding the continuation of this goal and what other interventions to add. FRC director will share the results with Oak Ridge Board of Education
- ❖ FRC Staff served on host school committees to include host school safety response team, attendance teams, Parent Advisory Committee, PBIS implementation team, attended parent teacher conferences and IEP meetings and served on various community boards and committees. The FRC director has also provided professional development for ORS and civic organizations in the community.

Submitted by: Jo Bruce

Date: 7/9/2020



Velocity, Inc. -200 West Airport Drive-Sebastian, FL 32958
Telephone (772) 589-1860 Facsimile (772) 589-1893

Purchase Agreement and Release Form

This Purchase Agreement and Release (Agreement) made this date (MM/DD/Year) _____ between Velocity, Inc. a Florida corporation (Seller) and _____ (Purchaser) hereinafter referred to individually as "Party" or collectively as "Parties".
Witnesseth

Whereas Velocity, Inc. is the owner and operator of a manufacturing company in the business of producing and selling experimental category amateur built airframe kits; and

Whereas the Purchaser identified above is desirous of purchasing an experimental category amateur built airframe kit offered for sale by the Seller commonly known as Velocity _____ (model). Now Therefore, the Parties agree as follows:

Article I
Transfer of Ownership

- 1.01 Date of Closing Velocity, Inc. agrees to deliver possession of purchased klt(s) at the time the kit(s) leave the factory, provided that all conditions of this Agreement have been complied with.
- 1.02 Serial Numbers Upon receipt of a deposit and this signed Agreement, the Seller will issue a serial number and an estimated delivery date.
- 1.03 Shipping The purchaser is responsible for making his own freight and insurance arrangements. The purchaser may ask the Seller to assist in this regard with the understanding that the Seller accepts no responsibility for debts or damage after klt(s) leaves the factory. Purchaser will be notified 30 days prior to date kit(s) is ready for delivery. Purchaser shall pay Seller a storage fee of \$10/day should the purchaser delay shipment beyond 30 days from the original ship-ready date.
- 1.04 forfeiture Should the Purchaser delay final payment or delay shipment of klt(s) beyond 6-months of the ship-ready date - the order shall be considered "Cancelled" and the Purchaser shall forfeit ownership of the klt(s) plus any and all deposits to the Seller.
- 1.05 Taxes and Special Assessments Purchaser is responsible for any taxes, duties, or special assessments applicable to the sale, purchase, and delivery of the indicated klt(s).

Article II
General

- 2.01 Experimental Aircraft Purchaser is fully aware and agrees that the airframe kits indicated in this Agreement are EXPERIMENTAL-AMATEUR BUILT AIRCRAFT and will not necessarily meet Federal Aviation Administration (FAA) requirements for certified aircraft. Velocity airframe kits do comply with the FAA's experimental category 51% built by amateur rule.
- 2.02 Inspections Purchaser accepts responsibility for completing all required inspections, whether by FAA or other governing bodies having jurisdiction. Further, the Purchaser agrees that completed aircraft will not be flown without an Airworthiness Certificated issued by the FAA or other governing bodies having Jurisdiction.
- 2.03 Personal Use Purchaser understands and agrees that the materials and information supplied in the kits sold by the Seller are available for the Purchaser's use only in the building of one aircraft. Purchaser agrees not to duplicate any parts or literature from the kits for resale or personal gain.
- 2.04 Warranties Seller warrants the components of each aircraft kit manufactured by the Seller to be free of defects in material and workmanship under normal use and service. It is understood that the Purchaser is the legal manufacturer of the aircraft and is responsible for deciding the airworthiness of parts used in the construction of his/her experimental aircraft. The Seller's warranty is limited to the repair or replacement at Seller's factory of any component that, within three (3) months after delivery of the kit to the original purchaser, is returned to Seller's factory with transportation costs prepaid, and which on examination appears to Seller to be defective. Purchaser shall be responsible for the payment of transportation charges for delivery of repaired or replacement components to the Purchaser. This warranty shall not apply to any components included in the kit, which were not manufactured by Seller, or to any part after it has been assembled into the aircraft. The warranty shall not apply to any components that have been repaired or altered outside of the Seller's factory in any way.
In no event shall Seller be liable for incidental or consequential damages, or shall Seller's liability for any claims or damage arising out of or connected with the sales contract with the Purchaser, or the sale, delivery, or use of the components covered by this warranty, exceed the purchase price of the kits.
The remedies provided for in this warranty constitute the sole recourse of Purchaser against the Seller for breach of any of Seller's obligations under the sales contract with Purchaser, whether the claim is made in tort or in contract including claims based on warranty, negligence, or otherwise.
THE FOREGOING WARRANTY IS EXCLUSNE AND IN IEU OF ALL OTHER WARRANTIES, WHETHER EXPRESSED, IMPLIED, OR STATUTORY INCLUDING BUT NOT BY WAY OF LIMITATION ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR ANY PARTICULAR PURPOSE.
- 2.05 SUCCESSORS and Assigns The terms, conditions and covenants of the Agreement shall be binding to the benefit of the successors and assigns of the relative Parties herein.
- 2.06 Indemnity To the extent permitted by Tennessee law, the Purchaser agrees to hold harmless and indemnify Velocity, Inc., its assigns, officers, directors, employees, designers and associates, from suits, actions, damages, liability and expenses in connection with loss of life, bodily or personal injury or property damage arising from the construction or operation of the aircraft, whether caused solely or in part by the negligence of the Seller, its agents or employees. Purchaser agree, to pay all costs, expenses and reasonable attorney's fees that may be incurred or paid by the Seller in enforcing the terms of this Indemnity agreement.
Purchaser agrees that this indemnification and hold harmless provision is a material consideration to Seller agreeing to the sale and purchase of the aircraft kit as set forth herein.
- 2.07 The Purchaser specifically acknowledges, understands and agrees that the Seller accepts no liability whatsoever for the air worthiness or structural integrity of the experimental amateur built aircraft constructed by the Purchaser or constructed in part or in total by someone else for the Purchaser from the materials provided by the Seller. The Seller has no control over the actual materials, processes or workmanship used by the builder. The builder constructs all flying and control surfaces.
The Purchaser should understand that the Velocity is an experimental category amateur built aircraft that requires the builder's utmost attention to detail in construction and operation. Failure to devote such attention may result in serious injury or death of the builder/operator. The Purchaser expressly assumes full risk and responsibility for any damage or claims resulting from the construction or operation of the aircraft.
The purchaser will have 30 days after delivery to his/her designated delivery point to inventory and provide a written account of any part(s) missing or unusable. After 30 days, no component or part will be replaced without cost to the consumer unless approved by Velocity.
- 2.08 Purchaser understands that the overall design and construction of the Velocity is based upon integral characteristics of airframe structure, critical engine and propeller characteristics, and critical aerodynamic center of gravity characteristics.
Purchaser understands and agrees that the engine and propeller and other critical components used on any Velocity must satisfy all the requirements specified in Seller's product manual Instructions and the Purchaser agrees that the above characteristics are critical and integral to the design of the Velocity. Purchaser agrees not to make any modification of any Velocity and agrees not to use any parts, components, or accessories that are not authorized and approved by Seller, and Purchaser assumes responsibility for any damages or losses which may result from the use of any parts, components, or accessories that are not authorized and approved by Seller.
Purchaser understands and agrees that the proper assembly of the Velocity is critical to the safe operation and maintenance of the aircraft. Purchaser agrees to take great care in following the assembly Instructions provided Purchaser by Seller and agrees to use such care in the initial assembly of any kit and when adding or substituting any parts or components subsequent to the initial assembly.
- 2.09 To the extent permitted by Tennessee law, the undersigned purchaser, for himself, his heirs, executors, administrators and assigns, hereby releases, waives, discharges and covenants not to sue the Seller, its assigns, officers, directors, employees, designers and associates for any liability, loss or damage, and any claims or demands therefore on account of personal injury, death or property damage arising from the use of the experimental kits, whether in construction or operation of the aircraft, and whether caused solely by the negligence of the Seller in whole or in part, its agents or otherwise.
- 2.10 This Agreement shall be construed and enforced in accordance with, and the rights of the parties herein shall be governed by the laws of the State of Tennessee. Any and all disputes arising under this Agreement, whether as to interpretation, performance, or otherwise, shall be subject to the exclusive jurisdiction of the courts of Anderson County, Tennessee or its federal equivalent and each of the parties herein Irrevocably agree to the exclusive Jurisdiction of the courts of the State of Tennessee.

For the Purchaser:
Signature: _____
Date: _____
Name (Print) _____
Address: _____

Co-Owner (If Applicable):
Signature: _____
Date: _____

Aviation Grant Cover memo

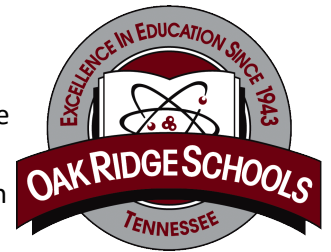
I am seeking permission to purchase: **\$139,735.00** in aviation equipment using Carl Perkins Reserve Grant funding. All purchases are sole source vendors, and do not require RFP or additional quotes.

The airplane build kit does not include an engine, so at this point, we are simply learning to build an airplane body. We will not be needing to incur additional liability coverage, as the airplane will not fly.

| Vendor | Description | 142-802-730 | 142-805-730 | GRAND TOTAL |
|--------------------------|---|-------------|--------------|------------------|
| Velocity Aircraft | Fixed Gear Fast-Build Kit with wings/canard and fuselage | | \$73,500.00 | |
| DJI Drones | Tello EDU and Mavic Mini Aircraft | \$6,960.00 | \$18,300.00 | |
| STEMPilot | Flight Simulators with Global Flight Software, STEMPilot K-12 Curriculum, and PD Training | \$26,985.00 | \$13,990.00 | |
| | | | | |
| TOTALS | | \$33,945.00 | \$105,790.00 | \$139,735 |

Oak Ridge Schools - SOLE SOURCE/PROPRIETARY VENDOR JUSTIFICATION FORM

Sole source purchases are goods and services available from only one supplier. Purchases for items that cannot be procured through the competitive bidding process because of the existence of a single source of supply, or because of a proprietary product must be documented as to why the item(s) is considered sole source. Failure to justify a sole source purchase through documentation is a violation of the 1957 Purchasing Act.



Description of items, its function and cost estimate (use back of form if needed) \$ _____

Sole Source Request: Service Contract Good or commodity

This is a sole source vendor because:

- Sole provider of a licensed or patented good or service; or
- Sole provider of items that are repair parts of or upgrades to existing equipment, systems; or
- Sole provider of factory-authorized warranty service; or
- Proprietary Vendor due to Compatibility of existing equipment or products is at issue; or
- Proprietary Vendor because Continuity of results is absolutely dependent upon the proprietary good or service at issue; or
- Proprietary Vendor because District staff or student have extensive training or experience with use of similar goods or services and changes would require significant reorientation and training; or
- Sole provider of unique equipment or products not offered by others. **(*Must complete section below)**

***What steps were taken to verify that these features are not available elsewhere?**

Other brands/manufacturers were examined (List specific company names, phone numbers and contact names, and explain why they were not suitable)

Other vendors were contacted (List specific company names, phone numbers and contact names, and explain why these were not suitable.)

What specific feature makes this item unique and why is this feature needed for your project? (Use back of form if needed)

*****The suggested vendor must provide a letter on their company letterhead stating the reasons that the item(s) is sole source. Attach to this form.*****

Suggested Vendor: _____

Department _____

Contact: _____

My department's recommendation for sole source is based upon an objective review of the goods/service being required and appears to be in the best interest of the School District.

[Signature]

Department Head's Signature Date 7/24/2020

Purchasing Specialist's Approval Date

Executive Director's Approval Date

Finance Director's Approval Date

From: [Duane Swing](#)
To: [Holly Cross](#)
Cc: art@velocityaircraft.com
Subject: [EXTERNAL] RE: Velocity XL interest for Oak Ridge High School
Date: Wednesday, July 15, 2020 2:29:04 PM
Attachments: [image007.png](#)
[image009.png](#)
[image010.png](#)
[image012.png](#)
[image001.png](#)
[image004.png](#)
[image006.png](#)
[image013.png](#)

WARNING: This email originates from an external source. Do not open any links or attachments unless you recognize and trust the sender.

Hi Holly,

Thanks for selecting Velocity for your school project. I understand the budgetary restraints you are under and here is what I can do for you and your grant investors. The XL Fixed Gear Kit along with the fast build wings/canard and fuselage would normally sell for \$80,500. I would not recommend the Retract Gear Option only due to the added insurance cost and the possibility that no insurance could be provided if the pilot doesn't have at least an instrument rating and 100 hours of retract time. So here is what I will do. The XL FG kit with the wing/canard and fuselage fast builds \$73,500.

Please stay away from any auto conversion as we have found them to be highly unreliable, especially the propeller reduction units, in other airplanes that have used them. Viking engines uses the Honda engine as a starting point but do not make an engine with more than 195 horsepower. They have been one of the few converters who have produced a good auto conversion. I have been told that they plan on producing a turbocharged Honda Accord engine of 252 horsepower which would work just fine but presently not available. Their engines cost about ½ or less than equal horsepower non turbo aircraft engines.

If this has merit for you, e-mail Art at art@velocityaircraft.com and ask him for the Order Form and the Purchase Agreement. Once these are signed and returned to us, along with a deposit of 20% (\$14,700) we will start the build process. Other items like engine install kits and other options can be ordered when the airframe is ready for these options.

To access the builders manuals, go to our web site and click on the owners page. Once you get to the manual section, you will need a user name which is nostall, and then the password which is nospin. I just tried it and it doesn't look like you will need either the user name or the password. (I will have to work on this)

Thanks again for your interest.

Duane Swing
CEO Velocity Inc.

From: Holly Cross [<mailto:HCross@ortn.edu>]
Sent: Wednesday, July 15, 2020 1:46 PM
To: duane@velocityaircraft.com
Subject: Velocity XL interest for Oak Ridge High School

Hi Duane,

I am working with Patrick LaDue, my instructor, on selecting an aircraft to purchase with our grant. I had budgeted \$75K for the kit, but it appears I will need to create some wiggle room on that amount, with your help.

Below, we have indicated the build we are interested in purchasing. We feel as if the yellow highlights indicate "needs," and the gray, "wants."

We would be interested in having a project management sheet, if possible.

We hope to generate interest and excitement about this project that will yield additional funds as needed to then purchase an engine and engine install package in the near future.

Patrick said you had communicated with him a few months ago about the possibility of using a GM LS-series engine with a hub adapter.

Thank you for talking with me today,
We look forward to beginning this project,
Holly Cross



Dr. Holly Cross

Oak Ridge Schools Supervisor

College, Career and Technical Education and Communications
1450 Oak Ridge Turnpike | Oak Ridge, TN 37830
hcross@ortn.edu | (865) 425-9557

7/15/2020

AIRCRAFT COMPARISON | Velocity Aircraft

[AIRCRAFT ABOUT](#)

[OWNERS CONTACT](#)

[FAQs](#)

[GALLERY](#)

Aircraft Pricing

| Aircraft | V-Twin | XL | SE |
|--|-----------|----------|----------|
| Kit Price | \$116,000 | \$53,500 | \$40,000 |
| Fastbuild Wings/Canard | Standard | \$16,000 | \$16,000 |
| Fastbuild Fuselage | Standard | \$11,000 | \$11,000 |
| Retractable Landing Gear | \$11,000 | \$11,000 | \$11,000 |
| Pre-Wired RG Pump and Control System with Harness | \$2,200 | \$2,200 | \$2,200 |
| Dual Side Stick Flight Controls | Standard | \$4,200 | \$4,200 |

| | | | |
|---|----------|----------|---------|
| Cleveland Heavy Duty Main Wheels and Brakes | Standard | \$2,100 | \$2,100 |
| Dash-5 Equipment* | \$0 | \$4,200* | - |
| Pre-Wired Airframe Electrical Harness; CB Panel; Overhead Switches | TBD | TBD | TBD |
| Luxury Edition Center Console & Instrument Panel | \$2,050 | \$2,050 | - |
| Engine Install Package | \$14,400 | \$7,200 | \$7,200 |
| Electric Heaters | TBD | TBD | TBD |
| Aluminum Booties | Standard | \$1,386 | \$1,386 |
| Pneumatic Door Seals | \$2,000 | \$2,000 | \$2,000 |

*The Dash-5 Equipment includes Cleveland Heavy Duty Main Wheels; Rear drop-down center keel; Carbon Fiber torsion wrapping of main landing gear strut(s); Rear bench seat with baggage platform in lieu of (2) bucket seats. Requires a 300hp+ engine.

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<https://www.velocityaircraft.com/aircraft-pricing>



VELOCITY

Velocity Airframe Kit Prices February 2019

BASIC AIRFRAME KIT PACKAGE PRICES

- Velocity SE 'Standard Elite' Fixed Gear 40,000
- Velocity XL-Fixed Gear \$53,500
- Velocity V-Twin (Complete with fastbuilds and Retract Gear) \$127,000
Available with Fixed Gear (Deduct \$11,000)

Every BASIC airframe package includes: Fixed landing gear, single centerline mounted flight control stick system, Elite (gull wing) doors, interconnected rudder pedals with toe-brakes on the pilot and copilot sides, detailed Construction Manual. V-Twin kit includes complete fastbuild fuselage and wings, toe brake system, dual side sticks and center throttle quadrant, Cleveland heavy duty wheels and brakes. Airframe kit buyers receive free unlimited factory technical support via telephone and Email. Prices do not include crating or delivery. See www.velocityaircraft.com for additional information on materials included with Velocity airframe kits.

MAJOR OPTIONS (All models)

- Fastbuild Wings/canard \$ 16,000
- Fastbuild Fuselage \$ 11,000
- Retractable Landing Gear \$ 11,000
- Pre-Wired RG Pump and Control System with Harness \$ ~~4,000~~ 2,100
- Dual Side Stick Flight Controls Option (standard on V-Twin) \$ 4,200
- Cleveland Heavy Duty Main Wheels and Brakes \$ ~~4,200~~ 2,000
(Standard on the XL dash 5 and V-Twin)
- Dash-5 Equipment Option (XL only, 200 lb. gross wt. increase) \$ 4,200

Dash-5 Equipment Option includes Cleveland HD Main Wheels and Brakes; Rear drop-down center keel; Carbon Fiber torsion wrapping of main landing gear strut(s); rear bench seat with baggage platform in lieu of (2) bucket seats. (Requires the 300 or 310 hp engine)

- Pre-Wired Airframe Electrical Harness; CB Panel; Overhead Switches SE \$ 11,000
- XL \$ 12,500
- V-Twin \$ 15,000
- Luxury Edition Center Console & Instrument Panel, XL and V-Twin only \$ 1,800
- Engine install package (all single engine and includes oil cooler/heater) \$ 6,800
- V-Twin engine install package (two engines & includes throttle quadrant) \$ 13,500
- V-Twin Gas Heater (uses self-contained Kerosene or Jet-A fuel) \$ 2,500

PRICING POLICY

- 1) All prices subject to change without notice
- 2) 20% deposit is required at time of order
- 3) Final payment is required 30-days prior to scheduled shipment
- 4) Please note: all deposits are non-refundable

Velocity, Inc
200 Airport Drive W, Sebastian, FL 32958
Email: info@velocityaircraft.com
Tel (772)589-1860

VELOCITY ORDER FORM

Name (print) _____

Shipping address if different

Address _____

City _____

State/Zip _____

Phone _____

Select Velocity Model () SE () XL () V-Twin

\$ _____

Select Options

() Fastbuild wings/canard

\$ _____

() Fastbuild fuselage

\$ _____

() Retract Gear

\$ _____

() Pre-Wire RG Pump and Control system with Harness

\$ _____

() Pre-Wire Airframe Electrical Harness; CB Panel with Overhead Switches

\$ _____

() Dual Side Stick Controls (standard on V-Twin)

\$ _____

() Cleveland HD wheels and brakes (Standard on Dash 5 and V-Twin)

\$ _____

() Luxury Edition Center Console & Instrument Panel (XL and V-Twin Only)

\$ _____

() Engine install package: () SE 4 cylinder () XL 6 cylinder Lycoming type 1 mount

() XL 6 cylinder IO 550 Continental mount

\$ _____

() Engine install package (V-Twin) 4 cylinder Type 1 Dynafocal mount only

() Head Start 2 week program (\$6,800)

\$ _____

Kit and all options selected TOTAL

\$ _____

Florida residents and customer pick-ups add 6% State Sales Tax

\$ _____

Florida residents and customer pick-ups add County Tax (\$50 only)

\$ _____

Sub Total

\$ _____

Less 20% Deposit at time of order (Check, MC, Visa or Discovery) \$ _____

Less Demo Ride Credit (if applicable) \$ _____

Total due Velocity Inc. 30 days prior to delivery

\$ _____

Make checks payable to:

Velocity Inc.

200 West Airport Drive West

Sebastian, FL 32958

Terms: All prices are FOB Sebastian, Florida and do not include the cost of crating or freight charges.

Purchaser is liable for all sales, use or other similar taxes resulting from this purchase that are levied by any agency for any jurisdiction which may apply to this purchase. Order cancellation will result in deposit forfeiture.

I, We the undersigned purchaser agree that I, We have read the terms and provisions set out in the Purchase Agreement and Release and that such terms and conditions form part of this contract as if fully set forth on the face hereof.

Purchaser Signature: _____

Date: _____

Spouse Signature (if applicable) _____

For Velocity: Date: _____ Received: \$ _____ Proposed Delivery _____

Order accepted and confirmed by: _____ of Velocity, Inc.



Velocity, Inc. - 200 West Airport Drive - Sebastian, FL 32958
Telephone (772) 589-1860 Facsimile (772) 589-1893

Purchase Agreement and Release Form

This Purchase Agreement and Release (Agreement) made this date (MM/DD/Year) between Velocity, Inc. a Florida corporation (Seller) and (Purchaser) hereinafter referred to individually as "Party" or collectively as "Parties".

Whereas Velocity, Inc. is the owner and operator of a manufacturing company in the business of producing and selling experimental category amateur built airframe kits; and
Whereas the Purchaser identified above is desirous of purchasing an experimental category amateur built airframe kit offered for sale by the Seller commonly known as Velocity (model). Now Therefore, the Parties agree as follows:

Article I
Transfer of Ownership

- 1.01 Date of Closing Velocity, Inc. agrees to deliver possession of purchased kit(s) at the time the kit(s) leave the factory, provided that all conditions of this Agreement have been complied with.
1.02 Serial Numbers Upon receipt of a deposit and this signed Agreement, the Seller will issue a serial number and an estimated delivery date.
1.03 Shipping The purchaser is responsible for making his own freight and insurance arrangements. The purchaser may ask the Seller to assist in this regard with the understanding that the Seller accepts no responsibility for debts or damage after kit(s) leaves the factory. Purchaser will be notified 30 days prior to date kit(s) is ready for delivery. Purchaser shall pay Seller a storage fee of \$10/day should the purchaser delay shipment beyond 30 days from the original ship-ready date.
1.04 Forfeiture Should the Purchaser delay final payment or delay shipment of kit(s) beyond 6-months of the ship-ready date - the order shall be considered "Cancelled" and the Purchaser shall forfeit ownership of the kit(s) plus any and all deposits to the Seller.
1.05 Taxes and Special Assessments Purchaser is responsible for any taxes, duties, or special assessments applicable to the sale, purchase, and delivery of the indicated kit(s).

Article II
General

- 2.01 Experimental Aircraft Purchaser is fully aware and agrees that the airframe kits indicated in this Agreement are EXPERIMENTAL-AMATEUR BUILT AIRCRAFT and will not necessarily meet Federal Aviation Administration (FAA) requirements for certified aircraft. Velocity airframe kits do comply with the FAA's experimental category 51% built by amateur rule.
2.02 Inspections Purchaser accepts responsibility for completing all required inspections, whether by FAA or other governing bodies having jurisdiction. Further, the Purchaser agrees that completed aircraft will not be flown without an Airworthiness Certificated issued by the FAA or other governing bodies having jurisdiction.
2.03 Personal Use Purchaser understands and agrees that the materials and information supplied in the kits sold by the Seller are available for the Purchaser's use only in the building of one aircraft. Purchaser agrees not to duplicate any parts or literature from the kits for resale or personal gain.
2.04 Warranties Seller warrants the components of each aircraft kit manufactured by the Seller to be free of defects in material and workmanship under normal use and service. It is understood that the Purchaser is the legal manufacturer of the aircraft and is responsible for deciding the airworthiness of parts used in the construction of his/her experimental aircraft. The Seller's warranty is limited to the repair or replacement at Seller's factory of any component that, within three (3) months after delivery of the kit to the original purchaser, is returned to Seller's factory with transportation costs prepaid, and which on examination appears to Seller to be defective. Purchaser shall be responsible for the payment of transportation charges for delivery of repaired or replacement components to the Purchaser. This warranty shall not apply to any components included in the kit, which were not manufactured by Seller, or to any part after it has been assembled into the aircraft. The warranty shall not apply to any components that have been repaired or altered outside of the Seller's factory in any way.
In no event shall Seller be liable for incidental or consequential damages, or shall Seller's liability for any claims or damage arising out of or connected with the sales contract with the Purchaser, or the sale, delivery, or use of the components covered by this warranty, exceed the purchase price of the kits.

The remedies provided for in this warranty constitute the sole recourse of Purchaser against the Seller for breach of any of Seller's obligations under the sales contract with Purchaser, whether the claim is made in tort or in contract including claims based on warranty, negligence, or otherwise. THE FOREGOING WARRANTY IS EXCLUSIVE AND IN IEU OF ALL OTHER WARRANTIES, WHETHER EXPRESSED, IMPLIED, OR STATUTORY INCLUDING BUT NOT BY WAY OF LIMITATION ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR ANY PARTICULAR PURPOSE.

- 2.05 Successors and Assigns The terms, conditions and covenants of the Agreement shall be binding to the benefit of the successors and assigns of the relative Parties herein.
2.06 Indemnity The Purchaser agrees to hold harmless and indemnify Velocity, Inc., its assigns, officers, directors, employees, designers and associates, from suits, actions, damages, liability and expenses in connection with loss of life, bodily or personal injury or property damage arising from the construction or operation of the aircraft, whether caused solely or in part by the negligence of the Seller, its agents or employees. Purchaser agrees to pay all costs, expenses and reasonable attorney's fees that may be incurred or paid by the Seller in enforcing the terms of this indemnity agreement. Purchaser agrees that this indemnification and hold harmless provision is a material consideration to Seller agreeing to the sale and purchase of the aircraft kit as set forth herein.
2.07 Warning The Purchaser specifically acknowledges, understands and agrees that the Seller accepts no liability whatsoever for the airworthiness or structural integrity of the experimental amateur built aircraft constructed by the Purchaser or constructed in part or in total by someone else for the Purchaser from the materials provided by the Seller. The Seller has no control over the actual materials, processes or workmanship used by the builder. The builder constructs all flying and control surfaces.
Warning: The Purchaser should understand that the Velocity is an experimental category amateur built aircraft that requires the builder's utmost attention to detail in construction and operation. Failure to devote such attention may result in serious injury or death of the builder/operator. The Purchaser expressly assumes full risk and responsibility for any damage or claims resulting from the construction or operation of the aircraft.
Warning: The purchaser will have 30 days after delivery to his/her designated delivery point to inventory and provide a written account of any part(s) missing or unusable. After 30 days, no component or part will be replaced without cost to the consumer unless approved by Velocity.
2.08 Design Integrity Purchaser understands that the overall design and construction of the Velocity is based upon integral characteristics of airframe structure, critical engine and propeller characteristics, and critical aerodynamic center of gravity characteristics.
Purchaser understands and agrees that the engine and propeller and other critical components used on any Velocity must satisfy all the requirements specified in Seller's product manual Instructions and the Purchaser agrees that the above characteristics are critical and integral to the design of the Velocity. Purchaser agrees not to make any modification of any Velocity and agrees not to use any parts, components, or accessories that are not authorized and approved by Seller, and Purchaser assumes responsibility for any damages or losses which may result from the use of any parts, components, or accessories that are not authorized and approved by Seller.
Purchaser understands and agrees that the proper assembly of the Velocity is critical to the safe operation and maintenance of the aircraft. Purchaser agrees to take great care in following the assembly instructions provided Purchaser by Seller and agrees to use such care in the initial assembly of any kit and when adding or substituting any parts or components subsequent to the initial assembly.
2.09 Release The undersigned purchaser, for himself, his heirs, executors, administrators and assigns, hereby releases, waives, discharges and covenants not to sue the Seller, its assigns, officers, directors, employees, designers and associates for any liability, loss or damage, and any claims or demands therefore on account of personal injury, death or property damage arising from the use of the experimental kits, whether in construction or operation of the aircraft, and whether caused solely by the negligence of the Seller in whole or in part, its agents or otherwise.
2.10 Jurisdiction This Agreement shall be construed and enforced in accordance with, and the rights of the parties herein shall be governed by the laws of the State of Florida. Any and all disputes arising under this Agreement, whether as to interpretation, performance, or otherwise, shall be subject to the exclusive jurisdiction of the courts of the State of Florida and each of the parties herein irrevocably agree to the exclusive jurisdiction of the courts of the State of Florida.

For the Purchaser:
Signature:
Date:
Name (Print):
Address:

Co-Owner (If Applicable):
Signature:
Date:



To: Holly Cross
Oak Ridge School

From: Duane Swing
Velocity Inc.
CEO and Owner

To Whom It May Concern,

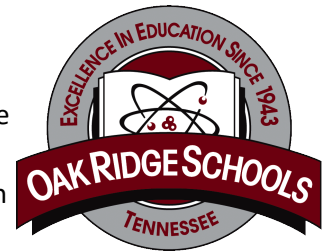
This letter is to confirm that Velocity Inc. is the builder of the Experimental Kit Aircraft (XL FG) and other models produced by Velocity Inc. and is the Sole Source for all aircraft under the Velocity Label.

We use no outside sales organizations in North America for the sale or shipment of these aircraft nor are there any other manufacturers of this kit aircraft in the world.

Duane Swing
CEO Velocity Inc.

Oak Ridge Schools - SOLE SOURCE/PROPRIETARY VENDOR JUSTIFICATION FORM

Sole source purchases are goods and services available from only one supplier. Purchases for items that cannot be procured through the competitive bidding process because of the existence of a single source of supply, or because of a proprietary product must be documented as to why the item(s) is considered sole source. Failure to justify a sole source purchase through documentation is a violation of the 1957 Purchasing Act.



Description of items, its function and cost estimate (use back of form if needed) \$ _____

Sole Source Request: Service Contract Good or commodity

This is a sole source vendor because:

- Sole provider of a licensed or patented good or service; or
- Sole provider of items that are repair parts of or upgrades to existing equipment, systems; or
- Sole provider of factory-authorized warranty service; or
- Proprietary Vendor due to Compatibility of existing equipment or products is at issue; or
- Proprietary Vendor because Continuity of results is absolutely dependent upon the proprietary good or service at issue; or
- Proprietary Vendor because District staff or student have extensive training or experience with use of similar goods or services and changes would require significant reorientation and training; or
- Sole provider of unique equipment or products not offered by others. **(*Must complete section below)**

***What steps were taken to verify that these features are not available elsewhere?**

Other brands/manufacturers were examined (List specific company names, phone numbers and contact names, and explain why they were not suitable)

Other vendors were contacted (List specific company names, phone numbers and contact names, and explain why these were not suitable.)

What specific feature makes this item unique and why is this feature needed for your project? (Use back of form if needed)

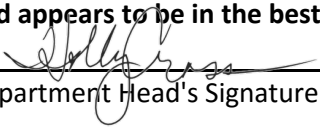
*****The suggested vendor must provide a letter on their company letterhead stating the reasons that the item(s) is sole source. Attach to this form.*****

Suggested Vendor: _____

Department _____

Contact: _____

My department's recommendation for sole source is based upon an objective review of the goods/service being required and appears to be in the best interest of the School District.

 _____
Department Head's Signature Date 7/24/2020



Purchasing Specialist's Approval Date

Executive Director's Approval Date

Finance Director's Approval Date

My Shopping Cart

Log in to synchronize the items in your shopping cart. [Log In Now >](#)

| Item | Item Price | Quantity | Price |
|---|------------|---|--|
| <input type="checkbox"/>  <p>Mavic Mini 1 business day after payment confirmation</p> | USD \$399 | <input type="button" value="-"/> <input type="text" value="10"/> <input type="button" value="+"/> | USD \$3,990 <input type="button" value="🗑"/> |
|  <p>DJI Care Refresh (Mavic Mini)</p> | USD \$39 | x 10 | USD \$390 <input type="button" value="🗑"/> |

📁 Enjoy a 1% rebate on every purchase in the form of DJI Credit - the more you buy, the more you earn.

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📄 Have a Coupon Code?

Proceed to checkout to use Coupons and DJI Credits.

CART SUBTOTAL: USD \$4,380

Tax: Calculated at checkout [?](#)

Shipping: Free

Financing available through [affirm](#) on orders over USD \$100

Continue Shopping



Check Out



Recommendations



Tello Flight Battery

USD \$20

Add to Cart



Tello Battery Charging Hub

USD \$25

Add to Cart



GameSir T1d Controller

USD \$49

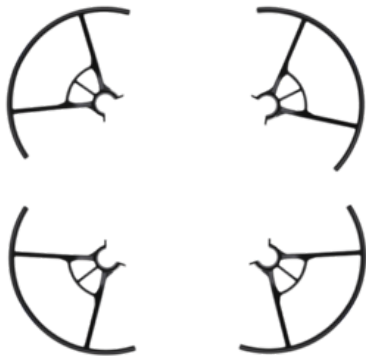
Add to Cart



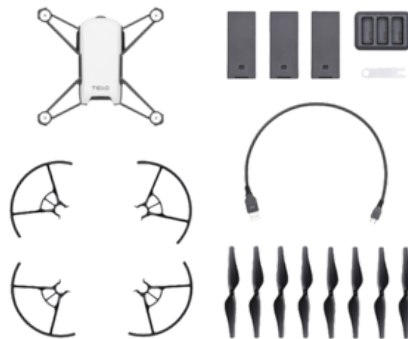
Tello Quick-Release Propellers

USD \$4

Add to Cart



Tello Propeller Guards



Tello Boost Combo



Tello Snap-on Top Cover



Tello

USD \$5

Add to Cart

USD \$149 ~~USD \$164~~

Add to Cart

(Blue)

USD \$9

Add to Cart

USD \$99

Add to Cart



Free shipping on orders over USD \$159



We accept credit cards, PayPal, and bank wires



Contact us: support@dji.com
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| Item | Item Price | Quantity | Price |
|--|------------|---|---|
|  <p>Tello EDU 1 business day after payment confirmation</p> | USD \$129 | <input type="button" value="-"/> <input type="text" value="20"/> <input type="button" value="+"/> | USD \$2,580  |
|  <p>Mavic Mini 1 business day after payment confirmation</p> | USD \$399 | <input type="button" value="-"/> <input type="text" value="20"/> <input type="button" value="+"/> | USD \$7,980  |
|  <p>DJI Care Refresh (Mavic Mini)</p> | USD \$39 | x 20 | USD \$780  |

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 Have a Coupon Code?
Proceed to checkout to use Coupons and DJI Credits.

 **CART SUBTOTAL: USD \$11,340**

Tax: Calculated at checkout 

Shipping: Free

Financing available through  on orders over USD \$100

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PrayPal

[Check Out](#)

Recommendations



Tello Flight Battery

USD \$20

[Add to Cart](#)



Tello Battery Charging Hub

USD \$25

[Add to Cart](#)



GameSir T1d Controller

USD \$49

[Add to Cart](#)



Tello Quick-Release Propellers

USD \$4

[Add to Cart](#)





Free shipping on orders over USD \$159



We accept credit cards, PayPal, and bank wires



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- Drones That Follow You
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- DJI's Gimbal Stabilizers
- Drones for sale

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- Return Policy
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| Item | Item Price | Quantity | Price |
|--|------------|---|---|
|  <p>Tello EDU 1 business day after payment confirmation</p> | USD \$129 | <input type="button" value="-"/> <input type="text" value="40"/> <input type="button" value="+"/> | USD \$5,160  |
|  <p>Mavic Mini 1 business day after payment confirmation</p> | USD \$399 | <input type="button" value="-"/> <input type="text" value="10"/> <input type="button" value="+"/> | USD \$3,990  |
|  <p>DJI Care Refresh (Mavic Mini)</p> | USD \$39 | x 10 | USD \$390  |

 Enjoy a 1% rebate on every purchase in the form of DJI Credit - the more you buy, the more you earn.
[Learn more about DJI Credit >](#)

 Have a Coupon Code?
Proceed to checkout to use Coupons and DJI Credits.


CART SUBTOTAL: USD \$9,540

Tax: Calculated at checkout 

Shipping: Free

Financing available through  on orders over USD \$100

[Continue Shopping](#)

PrayPal

[Check Out](#)

Recommendations



Tello Flight Battery

USD \$20

[Add to Cart](#)



Tello Battery Charging Hub

USD \$25

[Add to Cart](#)



GameSir T1d Controller

USD \$49

[Add to Cart](#)



Tello Quick-Release Propellers

USD \$4

[Add to Cart](#)

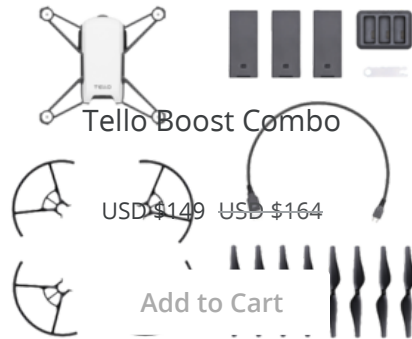




Tello Propeller Guards

USD \$5

Add to Cart



Tello Boost Combo

USD \$149 ~~USD \$164~~

Add to Cart



Tello Snap-on Top Cover (Blue)

USD \$9

Add to Cart



Tello

USD \$99

Add to Cart



Free shipping on orders over USD \$159



We accept credit cards, PayPal, and bank wires



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Date: July 23, 2020
Quote written by: SD
 STEMPilot inc.
 20 South Commons Rd.
 Waterbury, CT 06704
O#: (203) 527-5747
Fax: (203) 528-3179

Representative Quote Requested by: Suleymar Dominguez
Contact Name: Holly Cross **Title:** Supervisor CTE Coordinator
Company/School: Oak Ridge High School
Street Address: 1450 Oak Ridge Turnpike
City/Town: Oak Ridge **State:** TN **Z.I.P. Code:** 37830
Phone #: 865-425-9557 **EXT (opt):** ### **Alternate # (opt):** (###) ###-####
Email: hcross@ortn.edu

| | | | |
|---|--|--|---|
| PAYMENT TERMS 50% Due with order 50% Due on delivery | ESTIMATED DELIVERY 6-8 weeks From date of processed order | F.O.B. Delivered to: 48 Contiguous States | SHIPS VIA Truck (lift gate optional) |
|---|--|--|---|

| PRODUCT DESCRIPTION & QUANTITY | | | | |
|--------------------------------|--|---|---|---------------------------|
| QTY | ITEM | DESCRIPTION | UNIT \$ | TOTAL |
| 1 | EDUSTATION PRO FLIGHT SIMULATOR <i>• 10v, 15amps</i> | <ul style="list-style-type: none"> Structure: Matte Black, welded steel frame w/locking casters Forward Display: 32" HD wide screen Computer: i3, Windows 10, DDR5 VideoCard | <ul style="list-style-type: none"> Controls: Yoke, Throttle Quadrant, Rudder Pedals, (Hands On) Nav+Com Radios, Switch Panel, and Auto-Pilot w/ Trim Sound: 2.1 (3) speaker sound system Dimensions: (L) 31" x (W) 30.5" x (H) 58" | \$ 6,995.00 \$ 6,995.00 |
| 1 | PILOT PRO 4 FLIGHT SIMULATOR <i>• 10v, 15amps</i> | <ul style="list-style-type: none"> Structure: matte black, welded steel tube frame w/ adjustable mounts for controls, displays and PC Forward Display: Forward view displayed on a 43" HD screen, and Left+Right views displayed on (2) 32" HD screens Cockpit Display: Fixed View of the Cockpit (instruments) on a 21.5" HD screen | <ul style="list-style-type: none"> Computer: i5, Windows 10, DDR5 VideoCard Controls: Yoke, Throttle Quadrant and Rudder Pedals Sound: 5.1 (6) speaker sound system Dimensions: (L) 67" x (W) 78" x (H) 60" | \$ 12,995.00 \$ 12,995.00 |

| QTY | ITEM / DESCRIPTION | UNIT \$ | TOTAL |
|-----|--|------------------|-------|
| | <ul style="list-style-type: none"> STEMPilot's "SAFEDrone" Classroom (MS & HS) Kit: (1) STEMPilot Curriculum Unit with Lesson Plans, (1) Classroom Course book, (1) Drone Training Simulation software pkg. with compatible controller, (16) Landing Targets, (5) Obstacles, (4) Guarded Prop. quad-copters + (1) spare, (4) extra batteries, (36) pairs of safety glasses, (1) Altitude Hold Post, (1) Foam Glider | \$ 2,995.00 | \$ - |
| | <ul style="list-style-type: none"> Drone Training Simulation Software Package: Licensed copy of drone flight training software with a compatible controller | \$ 450.00 | \$ - |
| | <ul style="list-style-type: none"> Elementary Flight Mount: Joystick with a removable mount, meant to provide a lower Flight control system for younger students | \$ 295.00 | \$ - |
| | <ul style="list-style-type: none"> Ocean Ft. Crate: Have your simulator shipped to you in a custom built, sea-worthy crate | \$ 1,600.00 | \$ - |
| | <ul style="list-style-type: none"> Upgrade to Pro: Add our mounted instrument panel system to your Edustation or Edsustation-3 to make it a "Pro". Includes: (Hands On) Nav+Com Radios, Switch Panel, and Auto-Pilot w/ Trim | Already Included | \$ - |
| | <ul style="list-style-type: none"> Extended Warranty: Per Year | \$ 650.00 | \$ - |
| | <ul style="list-style-type: none"> Extended Subscription: Per Year | \$ 99.00 | \$ - |
| | Additional Information | \$ - | \$ - |

| INCLUDED | | | |
|---------------------------|---|--|---|
| ITEM | DESCRIPTION | | |
| "GLOBAL" FLIGHT SOFTWARE | <ul style="list-style-type: none"> Licensed, installed and activated copy of Prepar3D by Lockheed Martin Over 80 aircrafts to choose from (including helicopters and drones) STEMPilot's Verbally & visually tutored, simulated learning missions for flight training & maneuvers. | | - |
| STEMPILOT K-12 CURRICULUM | <ul style="list-style-type: none"> K-12 Curriculum with; Media supported Lesson Plans, Student Worksheets, Answer Keys, and Pre-Flight Briefings with a flight execution checklist for each Tutored Mission. Structured with easy to follow chapters and requires no prior aviation experience Teaches principles of flight leveraging STEM concepts such as; geometry, algebra, trigonometry, physics, meteorology, geography & topography Aligned to Next Generation Science Standards, Common Core, & NYC Science Scope & Sequence | | - |
| 1-YEAR WARRANTY | <ul style="list-style-type: none"> Our products are guaranteed for 1 year from date of purchase for defects in workmanship (Extensions are only sold in 1-year increments and are available to be purchased on the initial order or at any point while the unit is covered.) | | - |
| P.D. TRAINING | <ul style="list-style-type: none"> 45-60 min training session (as needed) for Staff & Students. Training executed on Location with any/all instructors involved. Video P.D Training Videos & Videos of every simulator training mission on the desktop | | - |

| | | | |
|-----------------|--|------------------|--------------|
| TOTAL UNITS: 1 | | SUBTOTAL: | \$ 19,990.00 |
| SALES TAX %: 0% | | TAX: | \$ - |
| | | TOTAL: | \$ 19,990.00 |

Note to Customer: Every Flight Simulator is set up with a default flight. It is simply the plane and location that will first appear upon loading your flight software. As a default, we usually set the location at or above a nearby airport and the aircraft to a Cessna 172. If you have any particular aircraft or location that you would prefer, we ask that you add it in the spaces below.

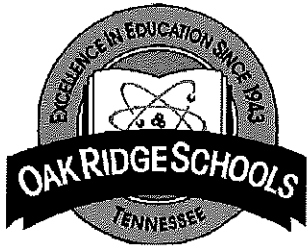
Instructor preferences for default flight Preferred aircraft: _____ Preferred airport: _____

Return Policy: We support and stand by our equipment and it is our desire that you be 100% satisfied. Returns must be authorized in writing by STEMPilot Inc. and a return authorization number will be issued with a pick-up authorization. It is STEMPilot's choice to repair or replace any defective product. Due to the specialty nature of our simulators there is a 50% restocking fee, plus return freight costs for returned products not defective or refused. Any damaged or missing components will be assessed upon receipt & adjusted as deemed necessary. The STEMPilot software is copyrighted and is only licensed / authorized to be used on one STEMPilot flight simulator. Copying of any kind is prohibited. By signing this; you agree to the preceding, our EULA & other vendors EULA, upon placing an order with STEMPilot Inc.

SOLE SOURCE LETTER

STEMPilot Inc. (Formerly HotSeat Inc.) designs and manufactures unique flight simulators sold directly to the education industry. Our unique products, curriculum, tutored missions and worksheets are copyrighted to protect these designs and content. (STEM Pilot, edustation® © HotSeat Inc. ®). STEMPilot Inc. is the prime manufacturer of the Edustation and Pilot Pro Flight Simulators. This provides the lowest end user cost. Our products have patent pending on unique features of our simulator designs. The edustation® is a proprietary product where we are the sole manufacturer. (Warranty support is based from our factory in Waterbury, CT. allowing immediate support, should it be necessary.)

To accept this quotation, sign here and return: _____ Date: _____



Oak Ridge Schools
Technology Department

Telephone (865)425-9015
Fax: (865)425-9062

MEMORANDUM

Date: July 27, 2020

To: Kelly Williams

From: Doug Cofer *DC*

Subject: MiFi's for Elementary Schools

I recommend the approval of the purchase of MiFi's from Verizon, with a total cost for one year in the amount of \$72,000. Funding is from anticipated donations. Funds for this purchase will come from the following account: 141-71100-722-000-00000-225.

Purchase will be off the State of Tennessee contract RSWC 811.

Susan Dundore

From: Johnston, Carol <carol.johnston@verizonwireless.com>
Sent: Friday, July 24, 2020 10:48 AM
Subject: [EXTERNAL] New Verizon plan is ready- \$15-\$20 option with filtering and device management for ease of support
Attachments: Distance Learning Press Release.pdf; Distance Learning Program.pdf

WARNING: This email originates from an external source. Do not open any links or attachments unless you recognize and trust the sender.

Happy Friday. Great News! The \$15-\$20 plan has launched and is ready to order. **Press release and details attached.** I know you have a lot on your minds these days and it seems it changes every day. We are doing all we can to ensure the safety and welfare of the students and staff.

Option 1. Kajeet

- *I work with you directly or partner with ENA. Kajeet offers a variety of plans and filtering and management is included.*

Option 2: State of TN : No upfront cost

- \$35.50 Unlimited plan with Mobile Device Management
- FREE 8800 on the State of TN contract. Connector for external Antenna to help boost signal
- \$20 2GB +1.50 MDM
- \$22 5GB +1.50 MDM
- \$24 10GB +1.50 MDM
- \$26 15GB +1.50 MDM
- \$28 25GB +1.50 MDM

NEW PLAN Option 3: Low Monthly plan with Filtering and Mobile Device Management

- LOA (Letter of Authorization required)
- \$20 Unlimited plan- Includes Mobile Device Management and Filtering – not using as we do not need the filtering system.
- \$60 900L
- \$149.99 8800- Connector for external Antenna to help boost signal
- Some counties are receiving \$ from non profits and companies within their area to help pay for the devices.

| Equipment | Quantity | Unit cost | Total cost |
|-------------------------------------|----------|-----------|------------|
| Jet Pack 900L or comparable device | | \$ 60.00 | \$ 0.00 |
| Jet Pack 8800L or comparable device | | \$ 149.99 | \$ 0.00 |
| Total equipment cost | 0 | | \$ 0.00 |

| Service plan | Quantity | Unit cost | Total cost |
|---|----------|-----------|------------|
| Unlimited Data for tablets and MiFi (per month) | 0 | \$ 15.00 | \$ 0.00 |
| Total service plan cost for six months* (Excludes required regulatory fees.) | | | \$ 0.00 |

*The service plan requires a minimum of 6 months of billed service per line.

| Optional features | Quantity | Unit cost | Total cost |
|--|----------|-----------|------------|
| Verizon Mobile Device Management (per month) | | \$ 1.49 | \$ 0.00 |
| Asavie MODA for CIPA Filtering (per month) | | \$ 3.50 | \$ 0.00 |

CONCERN #1:

- Some of you have expressed that you do not have the IT staff to easily manage these devices. This is where we can help.
- What does the Verizon MDM do for the MIFI card management and how can it help us simplify the process?
- Have existing MIFI Cards and want to add on? \$1.50 each line.

1. **Limit how many devices connected at one time** - eliminates concerns that you are providing internet to the household
2. **Control Data Usage** - If on one of the State of TN tiered plans, allows you to avoid any overage charges
3. **Mac Filter** -# of MAC ID's depends on device - bulk upload option
4. **Set DNS server of your choice** -IE filtering server IF server allows and has public facing static IP)- Can Connect to your filtering software
5. **Change/Set/Hide SSID and or password**

Broadband hotspot management adds additional capabilities, allowing you to:

- Centrally manage select Jetpack and USB devices via the Verizon MDM portal.
- Set dynamic limits on data usage.
- Manage and store policies for each Jetpack device in the cloud.
- Prevent users from changing settings, configure security settings remotely and restrict device connections.
- Group devices and apply policies based on departments, locations or roles.
- Support a variety of enterprise-grade Jetpack devices and USB devices.

CONCERN #2.

- I don't know how many we need.

Recommendation: WHILE SUPPLIES LAST-

Susan Dundore

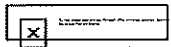
From: Johnston, Carol <carol.johnston@verizonwireless.com>
Sent: Friday, July 24, 2020 2:44 PM
To: Susan Dundore
Cc: Douglas Cofer
Subject: Re: [E] RE: [EXTERNAL] New Verizon plan is ready- \$15-\$20 option with filtering and device management for ease of support

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No problem. I welcome the opportunity to partner with Oak Ridge Schools.

Good news, YES to all questions. You are set to go.

CJ



Carol Johnston

Advanced Data Solutions Manager
Federal and Local Government Accounts
Mobile 865 -207- 7402
Government Support 800-295-1614
carol.johnston@verizonwireless.com
Knoxville, TN

[Join My Meeting](#)

On Fri, Jul 24, 2020 at 2:32 PM Susan Dundore <SWDundore@ortn.edu> wrote:

Carol,

Yes, I did see that, and it is a positive point. I just want to make sure of a few things, and sorry for so many emails, but this has to go before the BOE and I need to get the information to the ASAP with who we recommend.

If we go with Verizon, we are looking at the \$15.00 a month pricing, with the option of the MDM. We understand that we basically have a 6-month commitment for this plan and after 6 months we can continue, if necessary or stop. Please answer the questions below:

1. After the 6 months are up, the monthly cost will be the same for at least another 6 months. Basically, the pricing is good for 1 year.
2. After 6 months, if we decide we only need 150 active MiFis we can deactivate the ones we don't need, and the monthly price is still the \$15.00.
3. If we go with the MDM, again the price will not go up after 6 months and if we only pay MDM on the devices being use.

Thanks for all the help.

Best Regards,

Susan Dundore

Susan Dundore, CAP, OM, TA

Administrative Assistant to Doug Cofer | Oak Ridge Schools

127 Providence Road, Oak Ridge, TN 37830

865-425-9093 swdundore@ortn.edu | www.ortn.edu

We belong to the following buying affiliates: BuyBoard, Cooperative Purchasing Venture, National IPA, NIGP, TCPN, Sourcewell, TIPS, and US Communities.

From: Johnston, Carol <carol.johnston@verizonwireless.com>

Sent: Friday, July 24, 2020 2:25 PM

To: Susan Dundore <SWDundore@ortn.edu>

Subject: Re: [E] RE: [EXTERNAL] New Verizon plan is ready- \$15-\$20 option with filtering and device management for ease of support

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Did they see we only have a 6 month commitment with Option 3 and No contract with option 2 with the State of TN lines?

Many people have looked at the Ts and Cs of our competition and they really like the flexibility of our agreements. Nobody knows when or how long this is going to last and schools don't want to get into a year or two year agreement.

US Cellular

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Doug,

So good to hear from you, Sir.

We have two plans that most school systems are utilizing. We have the first option which is cheaper and the second option that has been approved till end of month and is a better overall value.

Option 1:

10GB \$20. Plan has no overages but will throttle to slower speeds (2g) at 10GB monthly. Hotspot devices would be .01 each. This would be a 2 yr term.

Option 2:

Fully unlimited, no throttle \$39 monthly. Hotspots would be discounted to free. This would be the best deal and at a 1 year term.

The hotspot device info is attached.

Please let me know if you have any questions or specifics that may help me in any way!

Thanks,



Nathan Milstead

Business Area Sales Executive

U.S. Cellular

m: 865.382.3536

a: 800 Cornerstone Drive, Knoxville, TN 37932

e: Nathan.Milstead@uscellular.com

To learn more, click here <https://business.uscellular.com/>

From: Douglas Cofer <DCofer@ortn.edu>

Sent: Monday, July 20, 2020 11:29 AM

To: Milstead, Nathan D <Nathan.Milstead@uscellular.com>

Cc: Susan Dundore <SWDundore@ortn.edu>

Subject: [EXTERNAL]: MiFis

Hey Nathan,

I hope you are doing well. Could you please send me information regarding US Cellular's mifi plans/options/deals for K12? Monthly/1 yr contract/2 yr contract options if that matters? The cheaper the better and no content filtering needed if that helps the pricing. Looking for around 300 units. I look forward to hearing from you, please let me know if you have any questions.

Thanks,

Doug Cofer

Director of Technology | Oak Ridge Schools
127 Providence Road – STE 100, Oak Ridge, TN 37830
865-425-9015 | dcofer@ortn.edu | www.ortn.edu

The charge of the Technology Department is to provide the highest quality technological services to Oak Ridge Schools through thoughtful planning, fiscal responsibility, and team oriented problem solving which continuously improves technology for staff to better serve the students of Oak Ridge Schools.

- For current Technology Department news & information, please visit <http://technology.ortn.edu>
- Need help with Technology? Please visit [our support page](#)
- Not sure how to ask for technology help? Please visit our [how-to page](#)
- Web Filter questions? Visit our Filter request [process and information page](#)
- Basic technology troubleshooting [tips and helpful information](#)

We're here to help bridge the gap between teachers and students



Rising to the coronavirus challenge

You educate a diverse and deserving population. COVID-19 has made your task more challenging than ever, so T-Mobile would like to help.

Unlimited Internet access on our advanced network

In response to CARES Act support for K-12 education, T-Mobile has initiated a new program that can help teachers and students stay connected. We've combined affordable devices with flexible wireless plans and no surprise fees to provide educators with full virtual classroom solutions. And with distance learning services on our advanced 4G LTE network, your students won't need any other home cable or wireless service to continue learning.

T-Mobile: a full-strength partner for rapid implementation

We know there's no time to waste, so we have the device inventory and staff needed to support rapid implementation. T-Mobile has already worked with major metropolitan school districts around the country, such as Washington, D.C.; Chicago; and Philadelphia. Our processes are in place to help you account for your use of these federal funds; we'll make tracking and reporting easy and transparent for your accountability.

[Check out this recent Forbes article](#) to discover how T-Mobile is helping educators across the country bridge the gap between teachers and students.

<https://go.business.t-mobile.com/keeping-students-connected-covid-19>

Pricing overview

Recommended:
Full virtual classroom
solutions as low as

\$20/line

per month

Unlimited high-speed data
on our network

or

Basic classroom
solutions as low as

\$10/line

per month

2GB of high-speed data
on our network

During congestion, the small fraction of customers using >50GB/mo. may notice reduced speeds until next bill cycle due to data prioritization. Video typically streams at 480p. Equipment options and pricing varies based on rate plan selection and term.

Dedicated teams to support you

As a nationwide wireless provider, T-Mobile maintains dedicated institutional sales and support staff to serve your region. Our teams are ready to discuss how we can quickly and efficiently implement this program, so your students can get connected and keep their learning on track.

K-12 education program pricing & plans

To help keep your students connected during the COVID-19 outbreak, we've created affordable new education programs and increased available data limits to 20GB on our standard 2GB plan through June 30, 2020.

| \$20/line per month | |
|---|---|
| 24-month commitment | 12-month commitment |
| <ul style="list-style-type: none">▪ Unlimited high-speed data on our network▪ Up to \$200 device credit (Eligible devices include hotspots, Google Chromebooks, tablets, data sticks, laptops, and more) | <ul style="list-style-type: none">▪ Unlimited high-speed data on our network▪ Mobile hotspot device included at no additional charge |

During congestion, the small fraction of customers using >50GB/mo. may notice reduced speeds until next bill cycle due to data prioritization. Video typically streams at 480p.

| \$10/line per month | |
|---|---|
| 24-month commitment | 12-month commitment |
| <ul style="list-style-type: none">▪ 2GB of high-speed data on our network per month, reduced data speeds up to 128kbps▪ Up to \$100 device credit (Eligible devices include hotspots, Google Chromebooks, tablets, data sticks, laptops, and more) | <ul style="list-style-type: none">▪ 2GB of high-speed data on our network per month, reduced data speeds up to 128kbps▪ Mobile hotspot device available at discounted rate of \$42 |

Select plans include:

- Content filtering from WebTitan by TitanHQ™, a third-party product that can filter even secured (https) traffic at the domain level.*
- Planning, implementation, and deployment support.**

*Schools that do not use a T-Mobile-facilitated filter thereby acknowledge that they will provide their own CIPA-compliant filter on all devices for the duration of their use.
**For some plans, a one-time charge may apply for staging, kitting, and delivery services.

July 29, 2020

Rationale for Woodland Position Change

The rationale for this position change is that we can serve more students with a full time Para-professional and help a novice teacher gain experience in Oak Ridge Schools. We will be able to serve at least twice as many students by changing this position from 50% Reading Specialist to 100% Para-Professional (with preferred certified credentials). We can also provide additional math interventions, in addition to Reading interventions.

The other elementary schools have two or fewer Reading Specialists so this change does not lower our comparability across the district.

Converting the .50 FTE Reading Teacher position to a 1.0 Para-Pro position would be an annual savings of \$4,493.94 in the FY21 Budget.

July 30, 2020

Rationale for two 0.5 FTE positions for ConnectOR

ConnectOR enrollment at the secondary level is currently at 20%. In order to support ConnectOR students while simultaneously serving on-campus students, two secondary 0.5 FTE teachers are needed for ELA and Math courses.

These positions will be funded with ESSER (CARES Act) funds and Intersession Funds.



OAK RIDGE SCHOOLS

SICK LEAVE BANK BOARD OF TRUSTEES

| | | |
|----------------|--------------------------------------|-------------------|
| BRUCE BORCHERS | Superintendent of Schools (Chairman) | |
| KEYS FILLAUER | Board Chairman | |
| ANGI AGLE | Board Member | Term Expires 2023 |
| JO BRUCE | OREA (WILLOW BROOK) | Term Expires 2023 |
| KIM BRINKMAN | OREA (GLENWOOD) | Term Expires 2023 |