

# Regular Board of Education Meeting

February 22, 2021 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

B. Volunteer Recognitions

## V. Public Forum

## VI. Consent Agenda

A. Board Minutes: 1-25-21

## VII. Items for Action

A. ESG Phase 2 Resolution

B. Engineering by Design Curriculum

C. 2022-2023 District School Calendar

D. Board Policy 1.700 School District Goals - First Reading

E. Board Policy 5.100 Personnel Goals - First Reading

F. Board Policy 4.700 Testing Programs - First Reading

G. ESSER 2.0 Federal Spending Plan

H. Purchase of Access Oak Ridge Student Laptops

I. Cal-First - Four Year Lease for Technology Equipment

J. Employee Bonus Proposal

K. FY21 Budget Amendment #1- First Reading

L. FY 21 Budget Amendment #1 - Second Reading

M. FY21 Budget Transfer #4 - First Reading

N. FY21 Budget Transfer #4 - Second Reading

## VIII. Items for Information

A. Attendance and Enrollment Reports

B. Head Start Community Assessment Update

C. Financial Report

## IX. Items for Discussion

## X. Old Business

## XI. New Business

## XII. Communications

## XIII. Adjournment

**RESOLUTION**

A RESOLUTION AUTHORIZING THE CITY TO ENTER INTO A CONTRACT WITH THE OAK RIDGE BOARD OF EDUCATION SETTING FORTH THE SCHOOLS' ANNUAL REIMBURSEMENT OBLIGATION TO THE CITY FOR AN ENERGY SAVINGS AND HVAC PROJECT WITH ENERGY SYSTEMS GROUP, LLC FOR SCHOOL FACILITIES.

WHEREAS, by Resolution 2-11-2021, City Council authorized the City Manager to move forward with an estimated \$7,400,000.00 energy savings and HVAC project for School facilities with Energy Systems Group, LLC, (ESG) subject to certain conditions being met; and

WHEREAS, one of those conditions is an agreement between City Council and the Oak Ridge Board of Education setting forth the parties' obligations for future debt repayment of the debt for this project; and

WHEREAS, in order for the City to move forward with this project, the City must have a commitment from the Schools for a determined amount to be able to budget for payment of the debt; and

WHEREAS, it is the City Manager's recommendation that City Council require the Schools to reimburse the City \$350,000.00 annually for twenty (20) years for repayment as funded by future energy savings for \$5,900,000.00 in debt to be incurred for the project; and

WHEREAS, additionally, it is the City Manager's recommendation that City Council require the Schools to further reimburse the City for improvements under this project in the amount of \$1,500,000.00, which funds the Schools expects to receive under the federal CARES Act II funding and which will be prioritized by the Board of Education to be allocated for this project upon receipt to be used for approved purchases in the Schools' ESSER 2.0 application; and

WHEREAS, City Council understands that should the Schools receive the CARES Act II grant funds, a future budget amendment will be presented for City Council's approval to allow the Schools to spend the CARES Act II grant funds which will include the \$1,500,000.00 allocated for energy savings projects with ESG for approved purchases in the Schools' ESSER 2.0 application.

NOW, THEREFORE, BE IT RESOLVED BY THE COUNCIL OF THE CITY OF OAK RIDGE, TENNESSEE:

That the recommendation of the City Manager is approved and in order for the City to move forward with execution of a \$7,400,000.00 energy savings and HVAC replacement project for the School facilities with Energy Systems Group, LLC, (ESG), the City and the Oak Ridge Board of Education shall enter into a contract setting forth the Schools' obligation and intent to reimburse the City in the amount of \$350,000.00 annually for twenty (20) consecutive years as repayment for \$5,900,000.00 in bonds for this project.

BE IT FURTHER RESOLVED that said reimbursement payments will be due annually at a set date to be determined between the parties by contract.

BE IT FURTHER RESOLVED that the Schools shall also be required in said contract to reimburse the City upon invoice for \$1,500,000.00 for improvements under this project, which funds the Schools expect to have available through the federal CARES Act II grant.

BE IT FURTHER RESOLVED that the Mayor is hereby authorized to execute the appropriate legal instruments to accomplish the same.

BE IT FURTHER RESOLVED that this resolution shall be forwarded to the Oak Ridge Board of Education to be executed by the Chairman of the Oak Ridge Board of Education which shall indicate the

Board's consent to the terms of this resolution and shall authorize the Chairman to execute appropriate legal instruments to accomplish the same.

This the 8th day of February, 2021.

APPROVED AS TO FORM AND LEGALITY:

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Tammy M. Dunn, City Attorney

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Warren L. Gooch, Mayor

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Mary Beth Hickman, City Clerk

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W. Keys Fillauer, Board Chairman, with approval  
as authorized by the Oak Ridge Board of  
Education on February 22, 2021



# Pathway Requests

Requests for new pathways are due by December 1 of the school year preceding implementation.

Date: 1/27/2021

Name of Proposed Pathway Engineering by Design

Pathway Description: Given the critical nature of much of the work in this cluster, job possibilities abound even in times of economic downturn. More scientists, technologists and engineers will be needed to meet environmental regulations and to develop methods of cleaning up existing hazards. A shift in emphasis toward preventing problems rather than controlling those that already exist, as well as increasing public health concerns, also will spur demand for these positions.

1. This pathway aligns with primarily which Key? 7
2. Do the courses in this pathway have special designations (e.g. honors, dual enrollment, industry certification, Advanced Placement)? Dual Enrollment, Industry Certification
3. How will students use this pathway as an area of focus? Please explain. STEM Engineering by Design as their path of study. Can courses within this pathway be counted as an enhancer to another area of focus? Please explain. This pathway includes: Foundations of Technology, Technological Design, and Advanced STEM Applications, which include transdisciplinary lessons including all areas of core content. Additionally, students earn industry certifications and dual enrollment, all aspects which can enhance any area of focus.
4. Are the courses within this pathway semester or year-long courses? Semester when we go to block If you chose *Other*, please explain.
5. How many credits would a student receive within each course in this pathway? 1 credit per course, with the option of taking 3 hours of dual enrollment from RSCC or 70 clock hours per semester with TCAT Knoxville.
6. What are the benefits of adding this pathway? This STEM pathway has been part of our curriculum for many years, but we have used Project Lead the Way curriculum. We want to declare to TDOE that we intend to continue using Engineering by Design curriculum for this STEM program of studies.
7. What are the disadvantages and/or challenges of adding this pathway? Please specify if any courses will have to be cut if this pathway is introduced. No disadvantages. TDOE has moved toward a more generic naming convention of the STEM pathways, which are aligned to state standards. They simply are requiring those who wish to continue to use Engineering by Design as the curriculum for STEM courses to apply for a special program of studies.
8. Do we already have Oak Ridge Staff who are certified to teach the courses in this pathway? Yes
9. If we already have Oak Ridge Staff who are certified to teach the courses in this pathway, what responsibilities do they currently have that they would no longer be able to fulfill if they teach these courses? We have maintained a staff member to teach the STEM program of studies for many years now. We have moved the focus from Project Lead the Way to Mechatronics standards to Engineering by Design curriculum over the past several years due to the prohibitive cost to train PLTW teachers.
10. If we already have Oak Ridge staff who are certified to teach the courses in this pathway, are they interested in teaching the courses? Why or why not? Yes, we have a staff member in place for the STEM
11. If we do not already have Oak Ridge staff who are certified to teach the courses in this pathway, what are the plans to fill this FTE? We have maintained an FTE for this position for many years.



12. Does this pathway require any partnerships with colleges, universities or other organizations? If so, have they been contacted? Please elaborate. We maintain DE agreements with RSCC and TCAT Knoxville.
13. Does this pathway require any special equipment and/or changes to the physical space? No, we have been offering this pathway for many years by different names in 3 spaces that have grown to suit the various needs of the program

A handwritten signature in cursive script, appearing to read "Holly Cross".

Holly Cross  
Name and signature of person  
requesting course or pathway

A handwritten signature in cursive script, appearing to read "John A. ...".

Name and signature of school principal

DRAFT

## 2021-22 Special Course and Special Program of Study Application

...

\* Required

## CTE Special Courses and Special Programs of Study

To accurately report Perkins V concentrator data, courses must be included in an approved program of study. Courses within a program of study must have an identified level.

As you proceed through this application, for each course level, you will be asked to identify if the course is a special course or a current, state-wide course with an active course code that begins with C, G, or S.

If you are applying for a special program of study using active, statewide course codes, you will simply enter those codes when asked.

If you have any questions, please email [CTE.Standards@tn.gov](mailto:CTE.Standards@tn.gov).

### 12. CTE Special Program of Study (SPOS) Name \*

### 13. Select the Career Cluster for this special course/program of study \*

- Advanced Manufacturing
- Agriculture, Food, & Natural Resources
- Architecture & Construction
- Arts, AV Technology, & Communications
- Business Management & Administration
- Education & Training
- Finance
- Government & Public Administration
- Health Science

- Hospitality & Tourism
- Human Services
- Information Technology
- Law, Public Safety, Corrections, & Security
- Marketing, Distribution & Logistics
- STEM
- Transportation

14. Provide a brief rationale for the proposed SPOS. \*

We want to continue to use Engineering by Design Curriculum and course progression, paired with Snap-On PMI certifications and AutoDESK Inventor and Fusion 360 certifications, as recommended in the EbD program sequence, and as shown in other STEM POS in the state document

15. SPOS Labor Market Data \*

*Identify the occupation(s) and careers aligned to this SPOS, and summarize and interpret the local/regional job outlook for the identified occupation(s)/career(s), including labor market data and citation of multiple sources.*

- I would like to UPLOAD the labor market data and justifications for this SPOS,
- I would like to TYPE IN the labor market data and justifications for this SPOS.

16. SPOS Labor Market Data Upload (Non-anonymous question ⓘ) \*

*Identify the occupation(s) and careers aligned to this SPOS, and summarize and interpret the local/regional job outlook for the identified occupation(s)/career(s), including labor market data and citation of multiple sources.*



Cluster\_Detail\_STEM.pdf

File number limit: 1 Single file size limit: 10MB Allowed file types: Word, Excel, PPT, PDF, Image, Video, Audio

## 17. Which early postsecondary opportunities (EPSOs) are available for this SPOS? \*

- Advanced Placement (AP)
- Cambridge International
- College Level Examination Program (CLEP)
- Dual Enrollment (DE)
- International Baccalaureate (IB)
- Local Dual Credit
- Statewide Dual Credit (SDC)
- Industry Credential (including industry certifications)
- EPSOs are not available for this SPOS.

## 18. SPOS Aligned Postsecondary Pathways \*

*Explain the local/regional postsecondary programs and industry certifications students expect to pursue upon completion of this SPOS at all types of postsecondary (TCAT, community college, four-year). Specify each institution where aligned programs are available (ex: TCAT-Anytown).*


We have an industrial maintenance dual enrollment course aligned to this program of studies with TCAT Knoxville, as well as a robotics dual enrollment opportunity with RSCC - Oak Ridge. We will continue to offer Snap-On PMI certification and AutoDESK certifications as aligned to other POS in the STEM career cluster.

## 19. List the names and titles of individuals who developed this SPOS. \*

ITEEA - Engineering by Design curriculum.

## 20. Upload Assurance signature sheets (Non-anonymous question ⓘ) \*

Assurances are needed for the (1) CTE Director; (2) Chairperson of local Board of Education); and (3) Director of Schools

 Upload file

File number limit: 3 Single file size limit: 10MB Allowed file types: Word, Excel, PPT, PDF, Image, Video, Audio

## 21. Date approved by the local board of education \*

Please input date in format of M/d/yyyy



## 22. Does this SPOS begin at Course Level 1 or Level 2? \*

*Note: All SPOS must have 3-4 courses, in course level sequence.*

Level 1 (Introduction)

Level 2 (Intermediate)

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# Oak Ridge Schools District Calendar 2022-2023

**Independence Day Holiday: July 4**  
**Counselors/Facilitators Report: July 5**  
**Teachers Report: July 18**  
**Students Report - Early Dismissal Districtwide: July 25**  
**Early Dismissal K-8 Only: TBD**  
**Election Day: No Students – August 4**  
**Labor Day Holiday: September 5**  
**Fall Break: October 3 – October 17**  
**Fall School Intersession: October 3 – October 6**  
**Staff Professional Development: No Students - October 17**  
**Students Return – October 18**  
**Fall Parent/Teacher Conferences: October 25/26**  
**Early Dismissal Elementary Only: October 25**  
**Election Day: No Students – November 8**  
**Thanksgiving Break: November 23-25**  
**Winter Break Early Dismissal Districtwide: December 16**  
**Winter Break: December 19 – January 3**  
**District New Year Holiday Observed – January 2**  
**Staff Professional Development: No Students - January 3**  
**Students Report: January 4**  
**Dr. Martin Luther King Jr. Holiday: January 16**  
**Winter Parent/Teacher Conferences: February 8/9**  
**Early Dismissal Elementary Only: February 9**  
**Staff Professional Development: No Students – February 20**  
**Spring Break: March 13-27**  
**Spring School Intersession: March 13-16**  
**Staff Professional Development: No Students – March 27**  
**Students Return – March 28**  
**Good Friday Holiday: April 7**  
**ORHS Commencement: May 25**  
**Memorial Day Holiday: May 29**  
**Student Last Day - Early Dismissal Districtwide: June 1**  
**Teacher Last Day: June 2**



1 <sup>st</sup> Quarter Days	48
2 <sup>nd</sup> Quarter Days	40
3 <sup>rd</sup> Quarter Days	46
4 <sup>th</sup> Quarter Days	46
<b>Total Instructional Days</b>	<b>180</b>

January 2023						
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February 2023						
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March 2023						
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April 2023						
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June 2023						
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July 2022						
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August 2022						
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September 2022						
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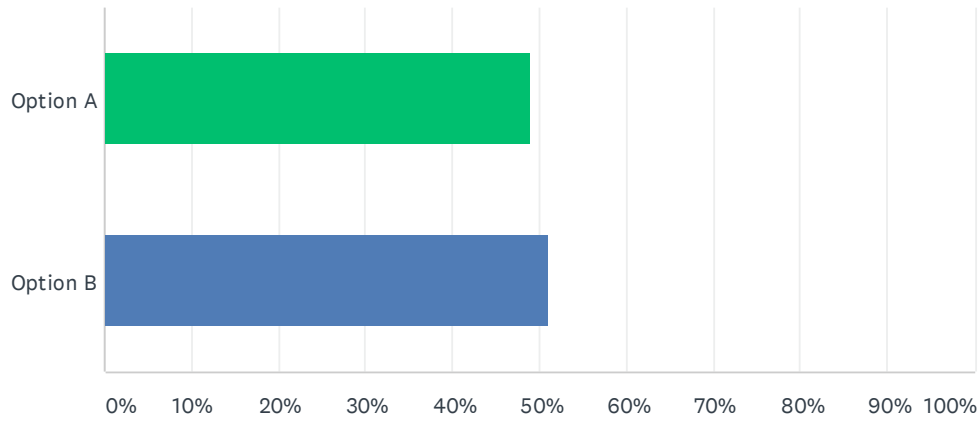
October 2022						
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November 2022						
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December 2022						
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# Q1 Select your choice for the 2022-2023 ORS District School Calendar:

Answered: 229 Skipped: 0



ANSWER CHOICES	RESPONSES
Option A	48.91% 112
Option B	51.09% 117
TOTAL	229

## Sandra Jones

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**From:** ORS District Bulletin  
**To:** EX All Staff  
**Subject:** 2022-2023 Calendar Survey  
**Attachments:** FY23 Calendar Option A.pdf; FY23 Calendar Option B.pdf

Staff,

I would once again like to thank the members of the calendar committee for their willingness to serve on the 2022–2023 School Calendar Committee. Their time and hard work is greatly appreciated.

The calendar committee has developed and approved two calendar options based on survey results for the 2022–2023 school year. Please read the following comparison information and review the two calendar options attached to this email prior to voting for your calendar of preference. The survey will close on **Friday, January 29, 2021 at 6:00pm**.

	Teacher Start	Student Start	Student End	Teacher End	District PD Days	Independent Teacher PD
Calendar A	Monday, July 18	Wednesday, July 27	Wednesday, May 31	Thursday, June 1	2 (July 25, 26)	6 hours
Calendar B	Monday, July 18	Monday, July 25	Thursday, June 1	Friday, June 2	3 (Oct. 17, Feb. 20, Mar. 27)	0 hours

**Calendar Option A** – Option A requires staff to earn an additional six hours of professional development during non-school hours. The information below provides clarity of specific activities that will be approved to earn the additional required six hours of PD.

### Approved Activities for Flexible PD

1. Option A requires staff to earn and document 6 hours of additional PD or instructional activities. These hours would be in addition to the 30 in-service hours that staff are currently required to earn.
2. The additional hours must be earned on **non-contracted work days**. This means staff would be required to earn the additional hours on days that staff are not contractually required to work.
3. Staff couldn't receive compensation for hours claimed as part of the current required hours.
4. Staff would be permitted to claim a maximum of 6 hours per day towards the required hours.
5. School Administration is committed to offering professional development opportunities on non-contract days to support staff in earning the required hours. Please note that Wednesday afternoons are part of contract time and would not count towards this requirement.
6. These hours must be completed prior to the end of the contact year, June 30<sup>th</sup>.
7. Teachers not earning the required hours would have their pay adjusted accordingly.
8. The additional hours would be monitored and approved by building administration and could be earned by participating in the following activities:

#### Approved Activities:

1. Attending an Oak Ridge Schools' professional development activity on a non-contract days.

2. Attending a state or other relevant professional development activity on a non-contract day.
3. Serving as a chaperone for a **school-sponsored** activity on a non-contract day.
4. Collaboratively participating in a school activity on a non-contract day. (Ex. PBL Planning, Pacing, PLC Activities, Curriculum Development, Team or Leadership Meetings)
5. Holding parent conferences on a non-contracted work day.
6. The following activities may be claimed if they have not already been claimed as part of the 30 hours required by the state:
  - a. Micro Credentials up to 6 hours of in-service credit
  - b. Safe Schools up to 2 hours of in-service credit
  - c. [Microsoft Education](#) for up to 3 hours of in-service credit

**The six examples provided above are not an extensive list. Staff can speak with their building principal to determine if a specific PD or instructional activity, not listed above, will be approved.**

**Non-Approved Activities:**

1. Activities that takes place on a contracted work day.
2. Activities that takes place on a non-contracted day if the employee has elected to receive a stipend or supplement.
3. Individual initiatives such as planning, grading student work or preparing a classroom.
4. Parent conferences on a contracted work day.
5. Working an athletic event or school sponsored activities on a contracted day.
6. Chaperoning a non-school-sponsored activity.

**Cast your vote with the link below:**

<https://www.surveymonkey.com/r/RJDD6HJ>

Thank you for your participation,  
Bruce Lay



**Oak Ridge Schools**  
SCHOOL LEADERSHIP

# OPTION A

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September 2022						
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November 2022						
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January 2023						
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February 2023						
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May 2023						
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June 2023						
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# OPTION B

## Oak Ridge Schools District Calendar 2022-2023

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August 2022						
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October 2022						
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November 2022						
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December 2022						
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January 2023						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

February 2023						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28				

March 2023						
S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

April 2023						
S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30						

May 2023						
S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

June 2023						
S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

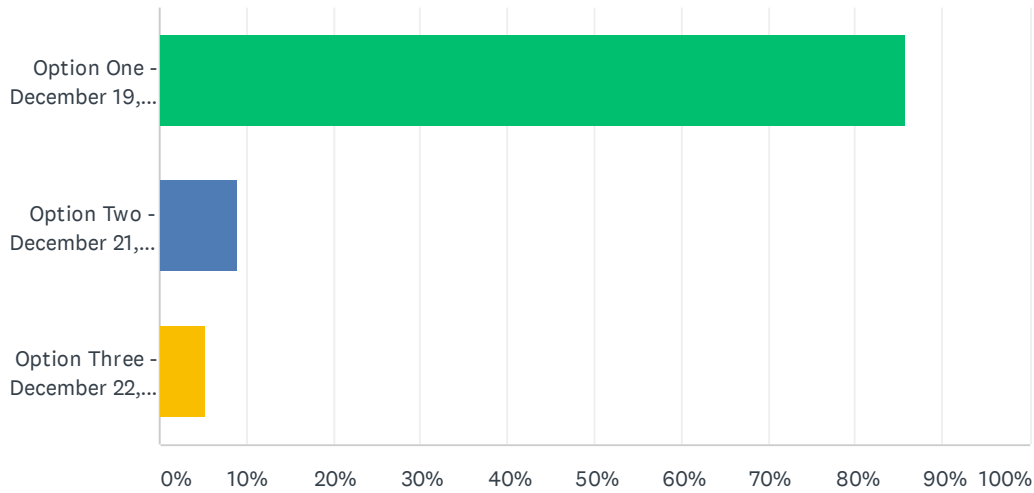
**Independence Day Holiday: July 4**  
**Counselors/Facilitators Report: July 5**  
**Teachers Report: July 18**  
**Students Report - Early Dismissal Districtwide: July 25**  
**Early Dismissal K-8 Only: TBD**  
**Election Day: No Students – August 4**  
**Labor Day Holiday: September 5**  
**Fall Break: October 3 – October 17**  
**Fall School Intercession: October 3 – October 6**  
**Staff Professional Development: No Students - October 17**  
**Students Return – October 18**  
**Fall Parent/Teacher Conferences: October 25/26**  
**Early Dismissal Elementary Only: October 25**  
**Election Day: No Students – November 8**  
**Thanksgiving Break: November 23-25**  
**Winter Break Early Dismissal Districtwide: December 16**  
**Winter Break: December 19 – January 3**  
**District New Year Holiday Observed – January 2**  
**Staff Professional Development: No Students - January 3**  
**Students Report: January 4**  
**Dr. Martin Luther King Jr. Holiday: January 16**  
**Winter Parent/Teacher Conferences: February 8/9**  
**Early Dismissal Elementary Only: February 9**  
**Staff Professional Development: No Students – February 20**  
**Spring Break: March 13-27**  
**Spring School Intercession: March 13-16**  
**Staff Professional Development: No Students – March 27**  
**Students Return – March 28**  
**Good Friday Holiday: April 7**  
**ORHS Commencement: May 25**  
**Memorial Day Holiday: May 29**  
**Student Last Day - Early Dismissal Districtwide: June 1**  
**Teacher Last Day: June 2**



1 <sup>st</sup> Quarter Days	48
2 <sup>nd</sup> Quarter Days	40
3 <sup>rd</sup> Quarter Days	46
4 <sup>th</sup> Quarter Days	46
<b>Total Instructional Days</b>	<b>180</b>

## Q1 Select the 2022-2023 Winter Break that you prefer:

Answered: 246 Skipped: 0



ANSWER CHOICES	RESPONSES
Option One - December 19, 2022 - January 2, 2023 This option has winter break start on Monday, December 19, 2022, with staff returning for a professional development day without students on Tuesday, January 3, 2023. This break would consist of 17 days.	85.77% 211
Option Two - December 21, 2022 - January 3, 2023 This option has winter break start on Wednesday, December 21, 2022 with staff returning for a professional development day without students on Wednesday, January 4, 2023. This break would consist of 14 days.	8.94% 22
Option Three - December 22, 2022 - January 4, 2023 This option has winter break start on Thursday, December 22, 2022, with staff returning for a professional development day without students on Thursday, January 5, 2023. This break would consist of 14 days.	5.28% 13
<b>TOTAL</b>	<b>246</b>

**From:** [ORS District Bulletin](#)  
**To:** [EX All Staff](#)  
**Subject:** Winter Break 2022-2023 Survey  
**Date:** Monday, December 7, 2020 2:42:00 PM  
**Attachments:** [Survey 1 Results FY23.pdf](#)  
[2022 2023 Calendar.pdf](#)  
[image003.png](#)

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Staff,

The attachment provides the results of the recent calendar survey that staff participated in last week. I will share that the members of the calendar committee were a little surprised by the response to question number four. In the past, staff has been consistent in requesting that our winter break be scheduled in a manner that would include three weekends which would result in a 17 day Winter Break. To assure we clearly understand staff preference in regards to when winter break will be scheduled in the 2022–2023 Calendar we are asking staff to take the time to complete the additional one question calendar survey. Please review the calendar in the second attachment before going to the survey link.

Please use the following link to access the survey:

<https://www.surveymonkey.com/r/L89VPCJ>

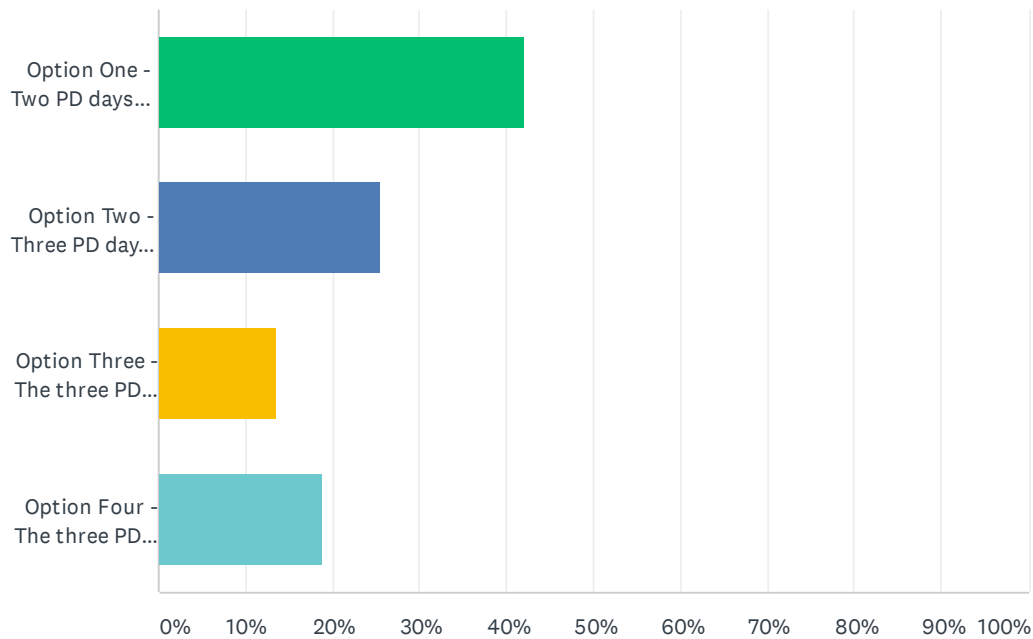
The survey will remain open until 4:00 pm on Friday, Dec. 11.

Thanks,  
Bruce Lay



# Q1 Review the four PD options and select the one that you prefer.

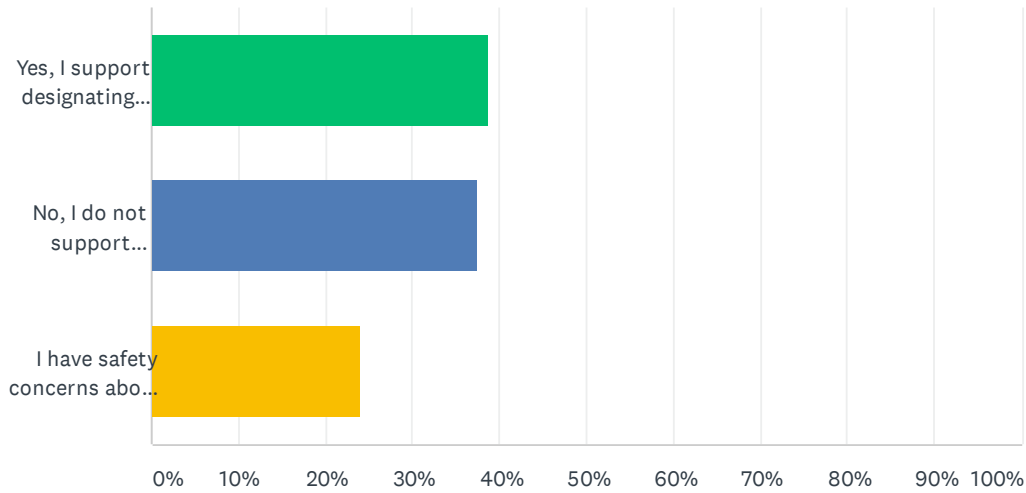
Answered: 243 Skipped: 7



ANSWER CHOICES	RESPONSES
Option One - Two PD days will take place at the beginning of the school year prior to the return of students for a total of 7 PD days. Certified staff would be responsible for earning 6 hours of PD during non-contract times to meet the requirements of the third PD day. This option is the PD plan we are currently using.	41.98% 102
Option Two - Three PD days would be scheduled on the following days (students would not attend on these days):1. One PD day would be scheduled on the last day of the first term prior to Fall Break2. The second PD day would be scheduled on President's Day3. The third PD day would be scheduled on the last day of term three prior to Spring Break	25.51% 62
Option Three - The three PD days would be scheduled on the following days and designated as system-wide PD days:1. Election Day2. Veteran's Day3. President's Day	13.58% 33
Option Four - The three PD days would be scheduled on the following days and designated as system-wide PD days:1. Veteran's Day2. President's Day3. The Monday following Good Friday	18.93% 46
<b>TOTAL</b>	<b>243</b>

## Q2 Do you support designating election days as virtual learning days? Staff would be required to report to work and provide virtual instruction to students at home from individual classrooms.

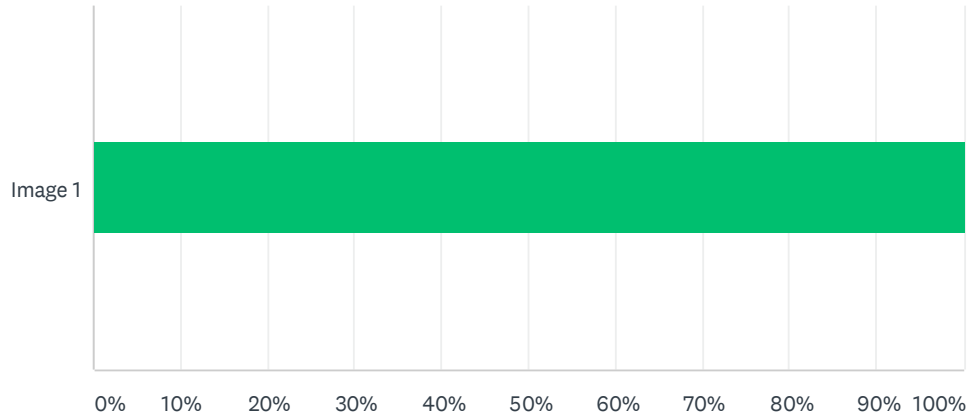
Answered: 246 Skipped: 4



ANSWER CHOICES	RESPONSES	
Yes, I support designating election days as virtual learning days.	38.62%	95
No, I do not support designating election days as virtual learning days.	37.40%	92
I have safety concerns about being in a building that is being used as a voting location on election day.	23.98%	59
<b>TOTAL</b>		<b>246</b>

### Q3 Calendar View to assist in Voting for Question 4

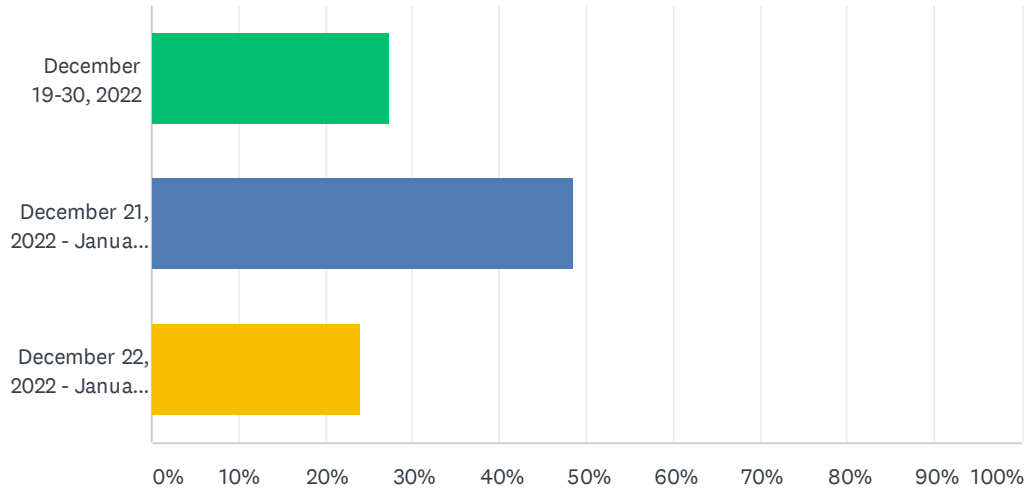
Answered: 96 Skipped: 154



ANSWER CHOICES	RESPONSES
Image 1	100.00% 96
TOTAL	96

### Q4 Please select the Winter Break option that you prefer:

Answered: 249 Skipped: 1



ANSWER CHOICES	RESPONSES	
December 19-30, 2022	27.31%	68
December 21, 2022 - January 3, 2023	48.59%	121
December 22, 2022 - January 4, 2023	24.10%	60
TOTAL		249

**From:** [ORS District Bulletin](#)  
**To:** [EX All Staff](#)  
**Subject:** 2022-2023 School Calendar Survey  
**Date:** Monday, November 30, 2020 9:15:00 AM  
**Attachments:** [image001.png](#)

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ORS Staff,

The calendar committee is currently working to develop the 2022-2023 School Calendar and are requesting staff members complete the survey provided below. Survey responses will be used to determine the specific calendar options that will be offered for the 2022-2023 calendar. As we develop the calendar, an effort will be made to align spring and fall breaks with neighboring school systems. The calendar survey will open on November 30 and close on December 4 at 4:00 pm. Building calendar representatives will receive a copy of the survey results to share at the building level. Calendar options will be available January 25-29, allowing staff to vote for their calendar preference.

Survey Link:

<https://www.surveymonkey.com/r/VVP7ND8>

**Bruce Lay**

Executive Director of School Leadership





# 2022-2023

## Calendar Committee

### Committee Members

- Kim Cox - Preschool
- Tracey Sizemore - Glenwood
- Traci Magee - Linden
- Michelle Goethert - Willow Brook
- Amanda Tiller - Woodland
- Scott Linn - Jefferson
- Amy Fuqua - Robertsville
- David Kolodney - ORHS
- Missy Morris - SCA
- Bruce Lay - SAB

### Committee Schedule

- **October 21 - 3:30 pm**  
Committee Meeting  
SAB Board Room
- **November 18 - 3:30 pm**  
Committee Meeting  
SAB Board Room
- **Nov. 30 - Dec. 4**  
Calendar Input Survey
- **January 13 - 3:30 pm**  
Committee Meeting  
SAB Board Room
- **January 25-29**  
Calendar Options Survey
- **February 1**  
Share Results w/Committee
- **February 22**  
Present Calendar to BOE for Approval

# Oak Ridge Board of Education

Monitoring: <b>Review: Annually, in September</b>	Descriptor Term: <b>School District Goals</b>	Descriptor Code: <b>1.700</b>	Issued Date: <b>04/28/14</b>
		Rescinds:	Issued:

1 ~~The Board is charged with the responsibility of determining the educational goals of the school system.~~  
2 ~~In discharging that responsibility, the Board has adopted the following goals in four primary areas:~~  
3 ~~Instruction, personnel, students and operations.~~

4 ~~The Board shall develop policies to implement the goals within each area and shall annually review~~  
5 ~~these goals and revise them as necessary so that each program will at all times support the stated goals.~~

6 ~~The Superintendent is responsible for developing procedures and strategies to implement the goals of~~  
7 ~~the Board.~~

8 The Board shall determine the educational goals of the school district. In discharging that  
9 responsibility, the Board has adopted the following goals:

## 10 INSTRUCTION

- 11 1. To promote a plan for the organized improvement of school curriculum, including the  
12 articulation transition between elementary and secondary schools;
- 13 2. To ~~provide offerings which explore~~ offer a wide range of career and service opportunities;
- 14 3. To promote an integration of academic, physical, social and emotional growth experiences for  
15 each student; and
- 16 4. To promote the recognition of achievement in all endeavors (example, academic, athletic).

## 17 STUDENTS

- 18 1. To structure the ~~overall~~ instructional program to provide ~~sufficient~~ necessary alternatives to  
19 meet a variety of individual needs and aspirations;
- 20 2. To ensure that each student's interests, capacities and objectives are considered in his/her  
21 learning program;
- 22 ~~3. To develop a comprehensive program for disabled students providing the least restrictive~~  
23 ~~programs; and~~
- 24 4.3. To help students gain understanding of themselves, as well as skills and techniques in living  
25 and working with others and being responsible citizens.

## 26 PERSONNEL

1 1. To ~~provide~~promote high quality performance by the staff, including both professional and  
2 support personnel;

3 2. To establish acceptable performance standards for all personnel;

4 2.3.To set goals for educator diversity that take into consideration the diversity of the student  
5 population;<sup>1</sup>

6 3.4.To provide in-service training and professional growth experiences for teachers and  
7 administrators; and

8 4.5.To maintain an evaluation system for the improvement of the instructional system.

## 9 OPERATIONS

10 1. To make every effort to secure adequate funding for the educational program in support of the  
11 stated goals;

12 2. To maintain an adequate system of fiscal and business management;

13 3. To develop plans for the efficient use of school facilities; and

14 4. To ensure appropriate communication between the Superintendent and the Board.

15 The Board shall annually review these goals and revise them as necessary.

16 The Superintendent of Schools is responsible for developing procedures and strategies to implement  
17 the goals of the Board.

18  
19 4.  
20

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### Cross References

Fiscal Management Goals 2.100  
Business Management Goals 3.100  
Instructional Goals 4.100  
Personnel Goals 5.100  
Student Goals 6.100

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Legal References

1. State Board of Education Policy 5.700; TCA 49-1-302(g)

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Cross References

- Role of the Board of Education 1.101
- Board Member Development Opportunities 1.204
- Fiscal Management Goals 2.100
- Business Management Goals 3.100
- Instructional Program 4.100
- Evaluations of Instructional Programs 4.702
- Personnel Goals 5.100
- Student Goals 6.100

# Oak Ridge Board of Education

Monitoring: <b>Review: Annually, in February</b>	Descriptor Term:  <b>Personnel Goals</b>	Descriptor Code: <b>5.100</b>	Issued Date: <b><del>1/26/15</del></b>
		Rescinds:	Issued:

- 1 The ~~Oak Ridge Schools Board~~'s personnel goals are:
- 2 1. To ensure that the Superintendent of Schools or designee recruits and employs the best
- 3 qualified individuals to staff the school ~~system~~district;
- 4 2. To provide compensation, benefits, and working environments sufficient to attract and retain
- 5 qualified employees;
- 6 ~~2.3.~~To set goals for educator diversity that take into consideration the diversity of the student
- 7 population;<sup>1</sup>
- 8 ~~3.4.~~ To provide an in-service training program for all employees to improve their performance; and
- 9 ~~4.5.~~ To conduct an evaluation program that will contribute to the continuous improvement of staff
- 10 performance; ~~and~~
- 11 ~~5. To ensure that personnel are assigned so that they are utilized as effectively as possible.~~

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Cross References

~~School District Goals 1.700~~

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Legal References

1. State Board of Education Policy 5.700; TCA  
49-1-302(g)

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Cross References

School District Goals 1.700

## Oak Ridge Board of Education

Monitoring: <b>Review: Annually, in November</b>	Descriptor Term:  <b>Testing Programs</b>	Descriptor Code: <b>4.700</b>	Issued Date: <b>09/23/19</b>
		Rescinds:	Issued: <b>05/21/18</b> <b>01/08/18</b> <b>05/22/17</b> <b>01/02/17</b> <b>06/27/16</b> <b>01/04/16</b> <b>11/24/14</b>

1 *General*

2 The Board shall provide for a system-wide testing program which shall be periodically reviewed and  
3 evaluated. The purposes of the program shall be to:

- 4 1. Assist in promoting accountability;
- 5 2. Determine the progress of students;
- 6 3. Assess the effectiveness of the instructional program and student learning;
- 7 4. Aid in counseling and guiding students in planning future education and other endeavors;
- 8 5. Analyze the improvements needed in a given instructional area;
- 9 6. Assist in the screening of students with learning difficulties;<sup>1</sup>
- 10 7. Assist in placing students in remedial programs;
- 11 8. Provide information for college entrance and placement; and
- 12 9. Assist in educational research by providing data.<sup>2</sup>

13 The Superintendent of Schools or designee shall be responsible for planning and implementing the  
14 program, which includes:

- 15 1. Determining specific purposes for each test;
- 16 2. Selecting the appropriate test to be given;
- 17 3. Establishing procedures for administering the tests;

- 1 4. Making provision for interpreting and disseminating the results;
- 2 5. Maintaining testing information in a consistent and confidential manner; and
- 3 6. Ensuring that results are obtained as quickly as possible, especially when placement in a
- 4 special learning program might be necessary.

5 State-mandated student testing programs shall be undertaken in accordance with procedures published  
6 by the State Department of Education.<sup>3</sup>

## 7 **WEIGHTING TCAP SCORES**

9 ~~TNReady<sup>4</sup> scores will be included in students' final grades for the spring semester as follows:~~

10 ~~—— Grades 3-8 — 15%~~

11 ~~EOC<sup>5</sup> scores will be included in students' final grades as follows:~~

12 ~~—— Grades 9-12 — 15%~~

13 ~~The methodology that is used to change raw scores provided by the state into student grades is called~~  
14 ~~Standard Deviation (10). This method determines how far a given raw score is from the average raw~~  
15 ~~score on the test. In general, students who are within  $\pm 1$  standard deviations would score between 75~~  
16 ~~and 95. Anything above or below one standard deviation would score above 95 or below 75 respectively.~~

17 ~~The Superintendent may exclude these scores from students' final grades if scores are not received by~~  
18 ~~the district at least five (5) instructional days before the end of the course.<sup>4,5</sup>~~

19 TNReady<sup>4</sup> scores will not be included in 3<sup>rd</sup>-4<sup>th</sup> grade students' standards-based grades.

20 TNReady<sup>4</sup> scores will be included in 5<sup>th</sup>-8<sup>th</sup> grade students' final grades for the spring semester as  
21 follows:

22 a) 2020-2021 school year – 15% if it raises the final course grade

23 b) 2021--2022 school year – 15%

24 The methodology that is used to change raw scores provided by the state into student grades is called  
25 Standard Deviation (10). This method determines how far a given raw score is from the average raw  
26 score on the test. In general, students who are within  $\pm 1$  standard deviations would score between 75  
27 and 95. Anything above or below one standard deviation would score above 95 or below 75 respectively.

28 EOC<sup>5</sup> scores will be included in students' final grades as follows:

29 a) 2020-2021 school year - 15% if it raises the final course grade

30 b) 2021-202 school year - 15%

1 The methodology that is used to change raw scores provided by the state into student grades is called  
2 Standard Deviation (10). This method determines how far a given raw score is from the average raw  
3 score on the test. In general, students who are within  $\pm 1$  standard deviations would score between 75  
4 and 95. Anything above or below one standard deviation would score above 95 or below 75 respectively.

5 The Superintendent may exclude these scores from students' final grades if scores are not received by  
6 the district at least five (5) instructional days before the end of the course.<sup>4,5</sup> For the 2020-2021 spring  
7 semester test administration, scores will only be included in students' grades if they benefit the student.

## 8 **INTEREST INVENTORIES AND CAREER ASSESSMENTS<sup>6</sup>**

9 Interest inventories shall be made available to middle schoolers. These will include assessments such as  
10 the Kuder assessment, Myers-Briggs Type Indicator, the ASVAB, or the College Board Career Finder.

11 Career aptitude assessments shall be administered to 8<sup>th</sup> graders in order to inform the student's high  
12 school plan of study.

## 13 **TESTING INFORMATION AND PARENTAL CONSENT**

14 Any test directly concerned with measuring student ability or achievement through individual or group  
15 psychological or socio-metric tests shall not be administered by or with the knowledge of any employee  
16 of the system without first obtaining written consent of the parents or guardians.<sup>2</sup>

17 Results of all group tests shall be recorded on the students' permanent records and shall be made  
18 available to appropriate personnel in accordance with established procedures.<sup>7</sup>

19 No later than July 31 of each year, the Board shall publish on its website information related to state  
20 and board mandated tests that will be administered during the school year. The information shall  
21 include:<sup>8</sup>

- 22 1. The name of the test;
- 23 2. The purpose and use of the test;
- 24 3. The grade or class in which the test will be administered;
- 25 4. The tentative date or dates that the test will be administered; and
- 26 5. The time and manner in which parents and students will be notified of the results of the test.
- 27 6. How parents can access the questions and answers on their student's state-required test.
- 28 7. If a district-mandated test, how the test complements and enhances student instruction and  
29 learning and how it serves a purpose distinct from state-required tests.  
30

- 1 Testing information shall also be placed in student handbooks or other school publications that are
- 2 provided to parents on an annual basis.
- 3

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Legal References

1. TCA 49-10-108
2. 20 USCA § 1232(g)
3. TRR/MS 0520-01-03-.03(7); TRR/MS 0520-01-03-.06(1)(b)
4. TCA 49-1-617; State Board of Education Policy 2.102
5. TRR/MS 0520-01-03-.06(1)(b); State Board of Education Policy 2.103; TCA 49-1-617
6. Public Acts of 2019, Chapter No. 108
7. TCA 10-7-504
8. TCA 49-6-6007; State Board of Education Policy 2.102; State Board of Education Policy 2.103

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Cross References

Student Surveys, Analyses, and Evaluations 6.4001  
Student Records 6.600

Budget Overview

**Oak Ridge (012) Public District - FY 2021 - Elementary and Secondary School Emergency Relief (ESSER) 2.0 - Rev 1 - Elementary and Secondary School Emergency Relief (ESSER) 2.0**

Indirect Cost	
Total Contributing to Indirect Cost	\$1,500,000.00
Indirect Cost Rate	18.04%
Maximum Allowed for Indirect Cost	\$229,244.32

Filter by Location: All - \$3,120,709.36 ▼

Account Number	71100 - Regular Instruction Program	72130 - Other Student Support	76100 - Regular Capital Outlay	Total
<b>Line Item Number</b>				
707 - Building Improvements			1,500,000.00	1,500,000.00
722 - Regular Instruction Equipment	1,045,709.36			1,045,709.36
790 - Other Equipment		575,000.00		575,000.00
<b>Total</b>	1,045,709.36	575,000.00	1,500,000.00	3,120,709.36
			<b>Adjusted Allocation</b>	3,120,709.36

Account Number	71100 - Regular Instruction Program	72130 - Other Student Support	76100 - Regular Capital Outlay	Total
Line Item Number				0.00
			<b>Remaining</b>	

Spending Plan

**Oak Ridge (012) Public District - FY 2021 - Elementary and Secondary School Emergency Relief (ESSER) 2.0 - Rev 0 - Elementary and Secondary School Emergency Relief (ESSER) 2.0**

After analyzing and repurposing other funding sources, justify the spending plan for the Coronavirus Response and Relief Supplemental Appropriations (CRRSA) Act funds aligned with the needs and the comprehensive LEA-level plan. For each of the applicable focus areas below, verify the amount, and explain how each focus area addresses the needs. The amounts should not exceed the LEA's allocation.

**1. Addressing Learning Loss: Coordinators, Summer, Supplemental After School, and Tutoring**

\$  Amount

The amount box auto-populates based on inputs from the Budget Page.

Describe how the proposed activities/use of funds supports the focus area and how the effectiveness of the activities will be assessed.

**2. Addressing Learning Acceleration: Summer, Supplemental After School, and Tutoring**

\$  Amount

The amount box auto-populates based on inputs from the Budget Page.

Describe how the proposed activities/use of funds supports the focus area and how the effectiveness of the activities will be assessed.

**3. Addressing Facility Needs and Deferred Maintenance/Infrastructure**

\$  Amount

The amount box auto-populates based on inputs from the Budget Page.

**NOTE:** Items in this category will require more extensive rationale/support.

Describe how the proposed activities/use of funds supports the focus area and how the effectiveness of the activities will be assessed.

Oak Ridge School must have dependable, operable HVAC systems to maintain healthy daily in-person instructional opportunities moving forward. The purchase of some of these items was halted due to pandemic needs.

To maximize the air quality throughout Oak Ridge Schools, the following facility upgrade measures have been fully designed and engineered and are requested to be included as long term investments in our allocation of ESSER 2.0 funding.

- Installation of ionization air purification technology in all HVAC units district wide (600 units). This technology will directly improve air quality by killing mold, bacteria and viruses that are airborne and on surfaces. Additionally the technology clumps particles in the air and enhances the ability of existing air filters to trap more pollutants. The devices that will be installed utilize patented Needle Point Bi-Polar technology that does not produce ozone and has a self-cleaning system to ensure ongoing full effectiveness.
- Replacement of ten (10) of the largest HVAC systems serving Oak Ridge High School. The current systems are past their useful life and have numerous repair issues that impact the consistency of proper ventilation air and temperature control.
- Replacement of thirteen (13) of the HVAC systems serving Woodland Elementary which makes up the majority of the systems serving this school. The current systems are past useful life and have numerous repair issues that impact the consistency of proper ventilation air and temperature control.

The total cost of these upgrades is \$1,500,000, with the majority of this cost being for the new equipment required for these upgrades. Beyond providing enhanced air quality and ventilation capability, these facility upgrades will also help Oak Ridge Schools to address failing HVAC equipment and associated rising utility expenses.

Effectiveness will be assessed by overall maintenance and utility cost savings and student and staff attendance.

#### 4. Purchasing Education Technology (including hardware, software, and connectivity)

\$ 1,620,709.36 Amount

The amount box auto-populates based on inputs from the Budget Page.

Describe how the proposed activities/use of funds supports the focus area and how the effectiveness of the activities will be assessed.

To continue to meet the current educational technology demands of the pandemic, Oak Ridge Schools needs to replace the current student computers with updated models. Student computers in grades 5-12 are five+ years old. These machines struggle to meet the demands of required hybrid, quarantine, and fully virtual instructional offerings, both synchronous and asynchronous. The replacement of student computers in grades 5-12 would ensure that all students are able to transition from in-school instruction to virtual instruction in a seamless manner. ESSER 2.0 funds in this category would be used in combination with a four-year district lease (1.2 million) to refresh the entire 5-12 student computer inventory. Student outcomes of improved technology access will be measured by district benchmarks (administered online) three times per year.

Throughout the pandemic Oak Ridge Schools has prioritized daily in-person learning for elementary students and consistently offered both in-person and virtual (hybrid) learning for students in grades 5-12. In addition the state academic standards, teachers in grades PreK - 8 have earmarked live instructional time needed to advance students' instructional technology skills; an essential endeavor for quarantines, short-term classroom closures, and hybrid students. While the newer student devices in the elementary grades have been key during this pandemic, teachers are finding it difficult to maximize instructional opportunities with dated and nonoperational classroom technology such as aging Smartboards and projectors. Interactive classroom panels will be purchased to replace active boards and projectors in core classrooms. These panels will allow teachers to better demonstrate and utilize instructional software for all students, allow small groups of students to share from their own devices during instruction, improve the visual quality of the instructional materials, and provide a platform for students to interact with curricular content during class. Student outcomes of improved technology access will be measured by district benchmarks (administered online) three times per year. Additional advantages include, but are not limited to:

- 4k Ultra HD, for all those videos we play in the classroom to supplement learning.
- Anti-glare tempered glass hard to break or scratch.
- Wireless capability and mobile stand capability (can be mounted and they have height adjustable mounting available). Can be used anywhere in a classroom.
- Remote control to freeze or mute image, adjust volume, select multiple sources.
- Multiple HDMI, USB, and Microphone inputs.
- 5 year advanced replacement warranty included.
- Cleaning kit included.
- Brightness beyond compare, no need to turn off lights.
- Simple stylus, no need to replace batteries or continually calibrate (no more, my pen won't work!).
- 10 points of touch, allows multiple students to interact with content (if the teacher loses the panel stylus it's easy to replace or use a finger instead).
- Teacher can connect laptop with HDMI cable or wirelessly.
- Students can connect with HDMI cable or wirelessly.
- Web browsing can be done without a laptop using built in hardware.
- Whiteboard can be used without laptop.
- Can screenshot anything on the board and save it with or without laptop.
- Can annotate over anything on the board with or without laptop.

Both of these items are long-term investments that will support instruction in multiple future scenarios.

### 5. Addressing the Unique Needs of Special Populations

\$  Amount

The amount box auto-populates based on inputs from the Budget Page.

Describe how the proposed activities/use of funds supports the focus area and how the effectiveness of the activities will be assessed.

### 6. Planning for Long-Term Closures

\$  Amount

The amount box auto-populates based on inputs from the Budget Page.

Describe how the proposed activities/use of funds supports the focus area and how the effectiveness of the activities will be assessed.

### 7. Providing Mental Health Supports

\$ 0.00 Amount

The amount box auto-populates based on inputs from the Budget Page.

Describe how the proposed activities/use of funds supports the focus area and how the effectiveness of the activities will be assessed.

### 8. Conducting Other Necessary Activities

\$ 0.00 Amount

The amount box auto-populates based on inputs from the Budget Page.

**NOTE:** Items in this category will require more extensive rationale/support.

Describe how the proposed activities/use of funds supports the focus area and how the effectiveness of the activities will be assessed.

### 9. Indirect Cost

\$ 0.00 Amount

The amount box auto-populates based on inputs from the Budget Page.

### 10. Administrative Cost (5% limit)

\$ 0.00 Amount

The amount box auto-populates based on inputs from the Budget Page.





# OAK RIDGE SCHOOLS

## Technology Department

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



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## MEMORANDUM

**Date:** February 12, 2021

**To:** Kelly Williams

**From:** Doug Cofer 

**Subject:** AOR Student Devices

I recommend the approval of the purchase of 2,797 Access Oak Ridge student laptops from CDWG in the total amount of \$2,629,180. Funding for 1,729 devices being purchased will be from a Cal-first Computer Lease (\$1,625,260), subject to the BOE approving the implementation of the Computer Lease. Funding for the balance will from ESSR 2.0. Account numbers are: 141-71100-722-000-00000-233 for the lease and 142-71100-722-935-00000-000 for ESSR 2.0.

Purchasing requirements were met by bid, advertised in the Knoxville News Sentinel and District Website. A total of 7 bids were received ranging from \$2,857,600 to \$3,225,400. CDWG was the lowest bid. The total number of devices requested was lowered from 3,040 devices to 2,797 devices to accommodate projected budget for this purchase.



# Oak Ridge Schools

OFFICE OF  
Business & Support Services

Telephone (865) 425-9005  
Fax: (865) 425-9060

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Bid Minutes

02/11/2021

Student Device Refresh (RFP 21-004)

Business Services Conference Room

Administration Building

Present for the bid opening were:

Susan Dundore  
Mary Ann Riley  
Jenifer Van Dyke

Oak Ridge Schools  
Oak Ridge Schools  
Oak Ridge Schools

Bid responses were received from the following companies:

<b>CDW-G Shelton, CT/Vernon Hills, IL</b>	<b>\$940.00/per</b>	<b>\$2,857,600.00 total *</b>
Howard Technology Solutions Ellisville, MS/Laurel, MS	\$1061.00/per	\$3,225,440.00 total
Insight Public Sector, Inc. Tempe, AZ	\$1029.46/per	\$3,129,558.46 total
SHI International Corp. Somerset, NJ	\$993.07/per	\$3,028,052.80 total
Technology Express Kingston, TN	\$1043.47/per	\$3,172,148.80 total
Unistar-Sparco Computer, Inc. Millington, TN	\$1023.12/per	\$3,110,284.80 total
Zones, LLC Auburn, WA	\$979.26/per	\$2,976,950.40 total

**\*Recommended Bidder**

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# Oak Ridge Schools

OFFICE OF  
Business & Support Services

Telephone (865) 425-9005  
Fax: (865) 425-9060

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**DATE:** February 12, 2021

**TO:** Pat Smith, Finance Director

**cc:** Jennifer VanDyke, Susan Dundore

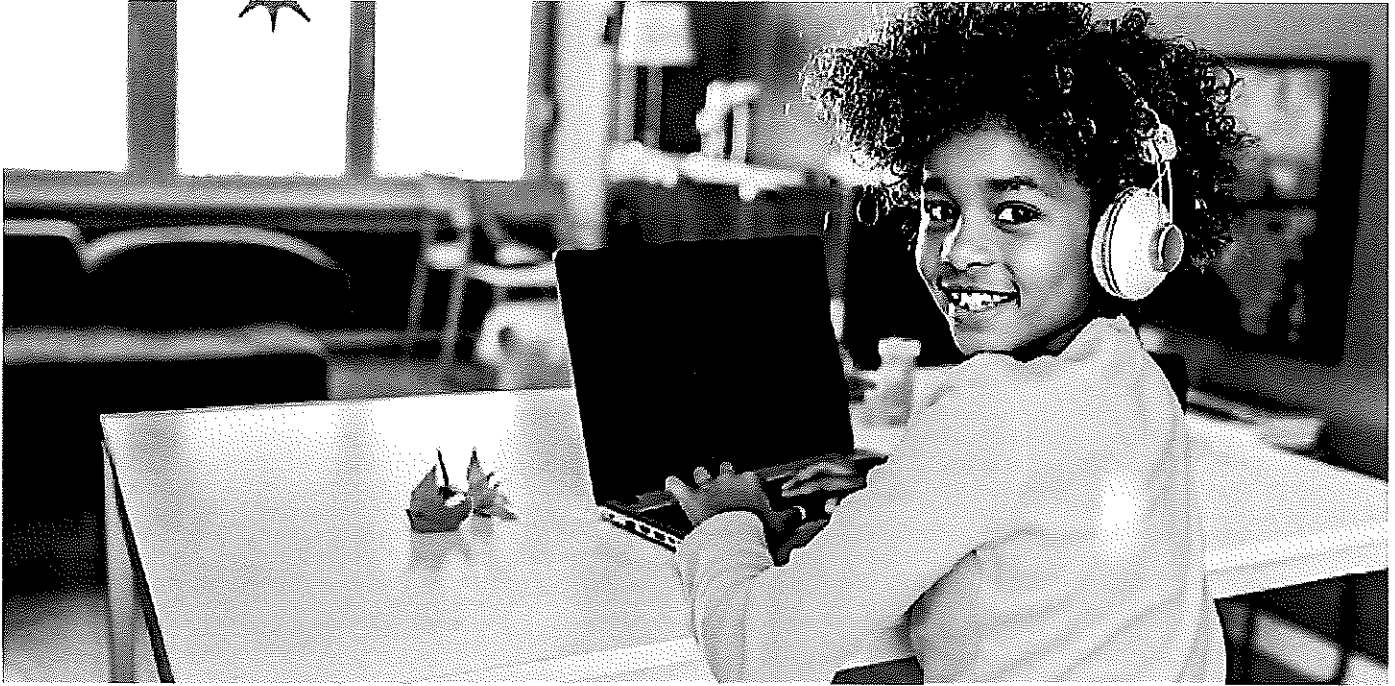
**FROM:** Mary Ann Riley, Purchasing Specialist, Oak Ridge Schools

**SUBJECT:** Recommendation of RFP 21-004 Student Device Refresh

I recommend that the Oak Ridge Board of Education accept the bid from CDW-G for the above mentioned bid. Their bid of \$2,857,600.00 (or \$940.00 per device) was the lowest bid that met all of the specifications. Bids ranged from \$2,857,600.00 (\$940.00 per device) to \$3,225,440.00 (\$1,061.00 per device).

Bids were advertised in accordance with state guidelines and also available on the Oak Ridge Schools' website and Vendor Registry. Seven companies responded with bids.

Attachment: Bid Minutes



# Oak Ridge Schools

Access Oak Ridge Student Refresh | RFP 21-004

Due Date

Original



CDW Government LLC  
230 N. Milwaukee Ave.  
Vernon Hills, IL 60061

All information and documents hereby submitted in response to the RFP 21-004 furnished by Oak Ridge Schools are the Proprietary and Confidential property of CDW Government LLC ("CDW-G").

© CDW Government LLC 2021



One CDW Way  
230 N. Milwaukee Avenue  
Vernon Hills, IL 60061

Phone: (847) 465-6000  
Fax: (847) 419-6200  
Toll-free: (800) 808-4239

CDWG.com

Oak Ridge Schools  
304 New York Ave  
Oak Ridge, Tennessee 37830

02/11/2021

**RE: RFP 21-004**

Dear Ms. Riley,

CDW•G understands the objective of the RFP is for Oak Ridge Schools to identify a reliable and experienced supplier partner capable of managing your Lenovo solution. Our response demonstrates CDW•G's ability to contribute to the overall success of this initiative. Specific advantages of partnering with us include:

- Extensive customized configuration services ensures products arrive at your locations ready to plug and play, maximizing your staff's productivity
- Highly trained and experienced account team, including a dedicated account manager is responsible for coordinating all of your needs and ensuring customer satisfaction
- Valuable presales consulting expertise assists with developing solutions that provide robust functionality, efficiencies, and cost savings.

As always, we consistently strive to exceed your expectations. Should you have any questions regarding our response, please contact your account manager, Rebekah Marco, at (866) 301-5740, or via email at rebmarc@cdwg.com. We thank you for the opportunity to participate in this RFP process and are confident you will find our response advantageous from both a strategic and budgetary standpoint.

Sincerely,

A handwritten signature in cursive script that reads "Stephanie Santander".

Stephanie Santander  
Director, Program Sales  
CDW Government LLC

\*It is CDWG's intent that the "Terms and Conditions of Product Sales and Service Project", accessed at <http://www.cdwg.com/content/terms-conditions/product-sales.asp>, provide the underlying terms and conditions to govern this submission, unless otherwise agreed upon in writing by the parties. CDWG would be happy to negotiate these or any other terms and conditions in good faith upon award.



**Business Department**  
School Administration Building  
304 New York Ave  
Oak Ridge, Tennessee 37830  
Phone (865) 425-9003  
Fax (865) 425-9060

## **Request for Proposal**

***Description of items/services requested:***

The Oak Ridge Schools Board of Education is soliciting proposals for 3040 devices and cases (**RFP 21-004**) **Access Oak Ridge Student Refresh.**

***General Requirements:***

Proposals, bids, or responses will be accepted by the Oak Ridge Schools Business Department no later than **10:00 AM EDT, February 11, 2021**. Every document must be enclosed in an envelope clearly marked as a bid document. Two full copies of the proposal must be submitted each with original signatures on both Bid Forms (included in this packet). Any response, bid, or proposal received after the above deadline shall be considered late, and will not be opened or considered. Bid prices must be valid for no less than sixty (60) days from the date of the bid.

All documents shall be submitted to the following address:

Mary Ann Riley, Purchasing Specialist  
Re: Access Oak Ridge  
Student Refresh  
(RFP 21-004)  
Oak Ridge Schools  
304 New York Ave  
Oak Ridge, TN 37830

**DEVICE SPECIFICATIONS:**

<b>20SES0PJ00</b>	<b>Notebook ThinkPad 11e Yoga Gen 6 20SECTO</b>
Country/Region	USA
Warranty	N01 1Y Courier/Carryin
Preload Type	Custom Image (Includes image load, domain join and running of task sequence)
Preload OS	Windows 10 Pro 64
Processor	Intel Core m3-8100Y Processor (1.10GHz, up to 3.40GHz with Turbo Boost, 2 Cores, 4MB Cache)
Security Chip Setting	Enabled Discrete TPM2.0
Display	11.6" HD (1366x768), IPS, Glare, 250nits, Multi-touch
Camera	720P HD Camera with Microphone
Onboard Memory	8GB LPDDR3 2133MHz Onboard
Storage Selection	256GB Solid State Drive, M.2 2242, PCIe-NVMe
Wireless LAN	Intel Wireless-AC 9260 2x2 AC, Bluetooth 5.0
Battery	4 Cell Li-Ion Polymer Internal Battery, 46Wh
Power Adapter	65W AC Adapter PCC (2pin)-US (USB Type C)
Keyboard	Keyboard Black English
Publication	Publication-English
OS DPK	W10 Pro
Preload Language	Custom Image:Windows 10 Pro 64 English
System Unit	Intel UHD Graphics 615
Display Shell	11.6" HD (1366x768), IPS, Glare, 250nits, Multi-touch, 720p HD Camera, Black
Lenovo Pen	Garaged Pen
Custom Image Type	Standard Image (ITC)
Custom Asset Tag	Enhanced Asset Tag
Custom Etching	Etching
BIOS Customization	Custom BIOS Settings
Absolute BIOS Selection	BIOS Absolute Enabled
LanSchool Software	Includes 1 Year of LanSchool
vPro Certified Model	No vPro Certified
Camera 2	None
Pointing Device	No Fingerprint Reader, No World Facing Camera Enabled, Pen Enable

**Specifications continued next page...**

**WARRANTIES AND CASE:**

Part Number	Description
5WS0N75634	4 Year Depot (School Year Term)
5PS0N75563	4 Year Accidental Damage Protection (School Year Term)
4X40L56488	ThinkPad 11.6-inch Work-In Case

**IMAGING AND ASSET TAGGING:**

Bidder will allow Oak Ridge Schools to submit a custom Windows image for the device with Lenovo.

The imaging process as provided by the Bidder will do the following:

- a. Image the device (image supplied by Oak Ridge Schools)
- b. The device is ORTN.local domain joined (Oak Ridge Schools can provide a VPN connection)
- c. Windows and Office licensed or ready to receive license from the ORTN domain
- d. BIOS or equivalent setup complete with password protection (password supplied by owner), TPM on for transparent use with bitlocker
- e. Windows machine name matching device asset number
- f. Asset tag must be on the device with number and barcode (sequence started with Oak Ridge Schools number)
- g. Device is etched with design agreed upon with owner

**As purchase is contingent upon multiple funding sources, Oak Ridge Schools reserves the right to split total purchase into multiple orders as necessary to fulfill specific requirements of each funding source.**

**ALL SHIPPING COSTS ARE TO BE INCLUDED IN THE FINAL PRICE. Delivery and invoicing shall be no later than June 25, 2021.**

**Submission Requirements:**

1. A detailed bid form, which includes quantity and unit cost must be included in the bid package. Please include specification sheets on all products/terms.
2. Two full copies of the proposal must be submitted, with original Bid Forms included with each copy.
3. A detailed description of all warranties and support for equipment and software must be included.
4. Any license or renewal costs (if any) shall be included in notes on the Bid Form. Specifically, anticipated annually recurring costs for maintenance, support, and software updates and upgrades, if any, must be listed.
5. The amount listed on the Bid Form should reflect the total implementation costs of this project as submitted.

**Functional Equivalents:**

No functional equivalents allowed. Only specified items accepted

**Schedule:**

Sealed bids will be opened at the School Administration Building, 304 New York Avenue, Oak Ridge TN, 37830, at **10:00 AM EDT, February 11, 2021.**

## Bidding Procedures

**Location:** All bids must be submitted to the Oak Ridge Schools Business Department at or before the announced deadline.

Mary Ann Riley,  
Purchasing Specialist  
Access Oak Ridge Student Refresh  
RFP 21-004  
304 New York Ave.  
Oak Ridge, TN 37830

**Award of Contract:** The owner (Oak Ridge Schools) further reserves the right to reject any and all bids, to waive any and all informalities and to negotiate contract terms with the successful bidder, and the right to disregard all non-conforming, non-responsive, or conditional bids. Oak Ridge Schools may conduct such investigations, as it deems necessary, to assist in the evaluation of any bid to establish the responsibility, qualifications, and financial ability of the bidder, proposed sub-contractors and other persons and organizations to perform the work in accordance with the contract documents to the bidder who does not pass any such evaluation to the owner's satisfaction. The contract shall be awarded to the bidder, whose evaluation by the owner indicates to the owner that the award will be in the best interest of Oak Ridge Schools. It is also understood that the "apparent low bidder" will be announced at the bid opening; however the "successful bidder," who may or may not be the lowest bidder, will not be announced until all issues, which include, but are not limited to quality, service, conformity to specifications, etc. have been resolved and until a period of review has been completed by the owner. Price will be the primary factor when determining the successful bidder assuming all bid specifications are met. Oak Ridge Schools does not enter into contracts that provide for mediation or arbitration. The owner (Oak Ridge Schools) further reserves the right to reject any and all bids, to waive any and all informalities, and to negotiate contract terms with the successful bidder (e.g., product line-item deletions or adjustments), and the right to disregard all non-conforming, non-responsive, or conditional bids.

**Bid Document:** For certain projects the Owner will supply a bid form to be completed by the bidder. When such forms are issued, only bids returned with the proper forms will be accepted. Envelopes must be sealed and marked as a bid document. Any bid may be withdrawn prior to the date and time as set forth in the "bid invitation."

**Errors in Bids:** When an error is made in extending total prices, the unit bid price will govern. Carelessness in quoting prices or in preparation of bid otherwise, will not relieve the bidder. Erasures or changes to bids must be initialed. Any alteration, erasure, addition to or omission of required information, change of the specifications, or bidding schedule, is made at the risk of the bidder.

**Facsimile transmissions:** Electronic transmissions will not be accepted, except when in the course of the bidding process addendums or other notifications of errors on behalf of the owner places an undue hardship upon prospective bidders. Written notification by the owner must precede the acceptance of Facsimile transmissions.

**Hold Harmless Agreement:** Bidders shall be required to complete the attached Hold Harmless Agreement.

**Laws and Regulations:** The bidder's attention is directed to the fact that all applicable state laws, municipal ordinances, and the rules and regulations of all authorities having jurisdiction over construction of the project shall apply to the contract throughout, and they will be deemed to be included in the contract the same as though herein written out in full.

**Legal Issues:** Contracts with Oak Ridge Schools will be subject to the laws of Tennessee. Disputes will be tried in the State of Tennessee and in the Court of Anderson County. Bids will be denied if these provisions are not included in the contract.

**Non-Collusion Affidavit:** Bidder shall be required to complete the attached Non-Collusion Affidavit.

**Payments:** Invoices that are submitted by the awarded bidder are required to provide accurate and current addresses. Payment terms shall be specified in the bid response, including any discounts for early payment. The Oak Ridge Schools Business Department discourages the practice of picking up checks in person, unless there is an emergency situation.

**Purchase:** No purchase or contract is authorized or valid until the issuance of a Purchase Order from Oak Ridge Schools and the Board of Education approval of project in accordance with Oak Ridge Schools Policy. No employee is authorized to purchase equipment, supplies or services prior to the issuance of such Purchase Order and Board of Education approval.

**Sub-contracts:** The Bidder is specifically advised that any person, firm, or other party to whom it is proposed to award a sub-contract under this contract must be acceptable to the Owner.

**Subcontractors and employees:** If work is to be performed during regular school hours when children are present, the BOE reserves the right to require background checks, dress codes, and certain ethical standards of all employees on school property.

**Taxes:** Oak Ridge Schools is tax exempt.

**Tie Bids:** If two or more bidders submit identical bids and is equally qualified; selection shall be made at the discretion of the owner.

**Title VI of the Civil Rights Act of 1964:** All interested parties, without regard of race, color, or national origin, shall be afforded the opportunity to bid and shall receive equal consideration. Title VI states "No person in the United States shall, on the ground of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any program activity receiving Federal financial assistance." Oak Ridge Schools strives to protect individuals' civil rights through active compliance with the requirements of Title VI.

**Vendor Indemnify:** Oak Ridge Schools will indemnify vendor to the extent Tennessee law allows.

**Warranty:** The vendor shall provide warranty information on the equipment, components and items bid with the bid submittal.

## Bid Form

Owner: Oak Ridge Schools Board of Education  
Mary Ann Riley, Purchasing Specialist  
School Administration Building  
304 New York Ave  
Oak Ridge, TN 37830

Project: **Access Oak Ridge Student Refresh  
(RFP 21-004)**

Bid Opening: **10:00 AM EDT, February 11, 2021**

Company Name: CDW Government LLC

Address: 230 N Milwaukee Ave  
Vernon Hills, IL 60061

Phone Number: (866) 301-5740

Email: rebmarc@cdwg.com

**Main Bid:** *This Price is to be for the complete package (including any fees/charges), materials, licenses, and labor: total of 3040 devices.*  
**ALL SHIPPING COSTS ARE TO BE INCLUDED IN THE FINAL PRICE.**

<b>Bid Amounts:</b>	<b>MAIN BID:</b>	<b>UNIT PRICE</b>
Device(s) as Specified on Page 2	<u>\$ 2,219,200.00</u>	<u>\$730.00</u> USD
4 Year Depot Warranty as Specified on Page 3	<u>\$ 249,280.00</u>	<u>\$82.00</u> USD
4 Year ADP Warranty as Specified on Page 3	<u>\$ 291,840.00</u>	<u>\$96.00</u> USD
Device Case as Specified on Page 3	<u>\$ 97,280.00</u>	<u>\$32.00</u> USD

Company: CDW Government LLC

Signature:  Stephanie Santander

Title: Director, Program Sales

Date: 02/09/2021

**Please attach detailed specifications. All shipping costs are to be included in final price.**



## Pricing and Warranty

### **Warranty Info:**

5WS0N75634 – Depot protection that gives parts and labor repair coverage, where shipping (including packaging) or delivery to the repair center is paid for by Lenovo.

5PS0N75563 – Protection that covers accidental drops and bumps, liquid spills, damage to the integrated LCD screen, structural failures incurred under normal operating conditions, and electrical surges. Allows for multiple accidental damage repairs and a system replacement if the damage is beyond economic repair.



# QUOTE CONFIRMATION



**DEAR SUSAN DUNDORE,**

Thank you for considering CDW•G for your computing needs. The details of your quote are below. [Click here](#) to convert your quote to an order.

QUOTE #	QUOTE DATE	QUOTE REFERENCE	CUSTOMER #	GRAND TOTAL
LWXT872	2/5/2021	STUDENT RFP	0729655	\$2,857,600.00

QUOTE DETAILS				
ITEM	QTY	CDW#	UNIT PRICE	EXT. PRICE
<u>LVO YOGA11E M3-8100Y W10P MC00036587</u> Mfg. Part#: 20SES0PJ00-MC00036587 Contract: MARKET	3040	6423732	\$730.00	\$2,219,200.00
<u>Lenovo 4 Year Depot Support Warranty (School Year Term)</u> Mfg. Part#: 5WS0N75634 UNSPSC: 81112307 Electronic distribution - NO MEDIA Contract: MARKET	3040	4473842	\$82.00	\$249,280.00
<u>Lenovo 4 Year Accidental Damage Protection Warranty (School Year Term)</u> Mfg. Part#: 5PSON75563 UNSPSC: 81112307 Electronic distribution - NO MEDIA Contract: MARKET	3040	4473765	\$96.00	\$291,840.00
<u>Lenovo ThinkPad Work-In Case Gen.2 notebook carrying case</u> Mfg. Part#: 4X40L56488 UNSPSC: 53121706 Contract: MARKET	3040	4146186	\$32.00	\$97,280.00

PURCHASER BILLING INFO		SUBTOTAL	\$2,857,600.00
<b>Billing Address:</b> OAK RIDGE SCHOOLS PO BOX 6588 OAK RIDGE, TN 37831-3221 Phone: (865) 425-9004 <b>Payment Terms:</b> NET 30 Days-Govt/Ed		SHIPPING	\$0.00
		SALES TAX	\$0.00
		GRAND TOTAL	\$2,857,600.00
<b>DELIVER TO</b> <b>Shipping Address:</b> OAK RIDGE SCHOOLS 127 PROVIDENCE RD SUITE 100 OAK RIDGE, TN 37830 <b>Shipping Method:</b> DROP SHIP-GROUND	<b>Please remit payments to:</b> CDW Government 75 Remittance Drive Suite 1515 Chicago, IL 60675-1515		

Need Assistance? CDW•G SALES CONTACT INFORMATION



Rebekah Marco

(866) 301-5740

rebmarc@cdwg.com

LEASE OPTIONS			
FMV TOTAL	FMV LEASE OPTION	BO TOTAL	BO LEASE OPTION
\$2,857,600.00	\$75,840.70/Month	\$2,857,600.00	\$87,814.05/Month

Monthly payment based on 36 month lease. Other terms and options are available. Contact your Account Manager for details. Payment quoted is subject to change.

Why finance?

- Lower Upfront Costs. Get the products you need without impacting cash flow. Preserve your working capital and existing credit line.
- Flexible Payment Terms. 100% financing with no money down, payment deferrals and payment schedules that match your company's business cycles.
- Predictable, Low Monthly Payments. Pay over time. Lease payments are fixed and can be tailored to your budget levels or revenue streams.
- Technology Refresh. Keep current technology with minimal financial impact or risk. Add-on or upgrade during the lease term and choose to return or purchase the equipment at end of lease.
- Bundle Costs. You can combine hardware, software, and services into a single transaction and pay for your software licenses over time! We know your challenges and understand the need for flexibility.

General Terms and Conditions:

This quote is not legally binding and is for discussion purposes only. The rates are estimate only and are based on a collection of industry data from numerous sources. All rates and financial quotes are subject to final review, approval, and documentation by our leasing partners. Payments above exclude all applicable taxes. Financing is subject to credit approval and review of final equipment and services configuration. Fair Market Value leases are structured with the assumption that the equipment has a residual value at the end of the lease term.

This quote is subject to CDW's Terms and Conditions of Sales and Service Projects at <http://www.cdw.com/content/terms-conditions/product-sales.aspx>  
 For more information, contact a CDW account manager

© 2021 CDW•G LLC, 200 N. Milwaukee Avenue, Vernon Hills, IL 60061 | 800.808.4239

**HOLD HARMLESS AGREEMENT**

This Hold Harmless Agreement is between CDW Government LLC  
Name of Contractor  
(Hereinafter Contractor), and Oak Ridge Schools named in this bid.

Contractor agrees that as a condition precedent to "Contractor" being awarded a contract from Oak Ridge Schools, "Contractor" agrees to indemnify, protect, defend, and hold harmless Oak Ridge Schools, its Board Members, agents, and employees from all judgments, claims, demands for payment, suits or actions of every nature and description brought against Oak Ridge Schools, its Board Members, agents, and employees alleging injuries or damages sustained by any person arising out of or in the course of "Contractor's" providing goods or services to Oak Ridge Schools.

Name of Contractor: CDW Government LLC

By: Stephanie Santander

Title: Director, Program Sales

STATE OF CT

County of Fairfield

Stephanie Santander personally appeared before me, the undersigned, with whom I am personally acquainted and who, upon oath, acknowledged that he/she/it executed the within instrument for the purposes therein contained, and who further acknowledge that he/she/it is authorized to execute this interment on behalf of CDW Government LLC.

Stephanie Santander

Signature

Witness by hand and Notaries seal at office this 9th day of February,  
year of 2021.

[Signature]

Notary Public

**Tarah Rachel Monday**  
Notary Public, State of Connecticut  
My Commission Expires 09/30/2025

My Commission Expires: 09/30/2025

**NON-COLLUSION AFFIDAVIT**

**NON-COLLUSION AFFIDAVIT TO BE EXECUTED  
BY DESIGN-BUILDER**

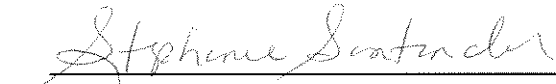
State of CT

County of Fairfield

Stephanie Santander, being first duly sworn, deposes and says that he or she is of the party making the foregoing bid is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation; that the bid is genuine and not collusive or sham; that the bidder neither possesses a business relationship with any employee of the District which may be involved in the award or administration of the project nor has received or solicited either directly or indirectly any inside information from an employee of the District which would give the bidder an advantage over any other bidder; that the bidder has not directly or indirectly induced or solicited any other bidder to put in a false or sham bid, and has not directly or indirectly colluded, conspired, connived, or agreed with any bidder or anyone else to put in a sham bid, or that anyone shall refrain from bidding; that the bidder has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the bid price of the bidder or any other bidder, or to fix any overhead, profit, or cost element of the bid price, or of that of any other bidder, or to secure any advantage against the public body awarding the contract or any interested in the proposed contract; that all statements contained in the bid are true; and, further, that the bidder has not, directly or indirectly, submitted his or her bid price of any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, or paid, and will not pay, any fee to any corporation, partnership, company, association, organization, bid depository, or to any member or agent thereof to effectuate a collusive or sham bid.

Subscribed and sworn to (or affirmed) before me this 9th day

of February, 2021.



Signature of ~~Officer~~ Authorized Signer



Notary Signature

Stephanie Santander

Typed Name of ~~Officer~~ Authorized Signer

Director, Program Sales \_\_\_\_\_

Office Title

**Tarah Rachel Monday**  
Notary Public, State of Connecticut  
My Commission Expires 09/30/2025

Notary Seal

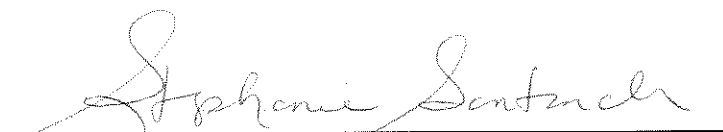
**WARNING! PROPOSALS WILL NOT BE CONSIDERED UNLESS THIS AFFIDAVIT IS COMPLETED AND EXECUTED, INCLUDING THE AFFIDAVIT OF THE NOTARY AND THE NOTORIAL SEAL.**

**IRAN DIVESTMENT ACT REQUIREMENTS**

Pursuant to Tennessee Code Annotated § 12-12-106 (as enacted by Chapter 817 of the Public Acts of 2016) the chief procurement officer for the State of Tennessee shall publish a list of persons determined to be engaging in investment activities in Iran. The list is posted on the website of the Tennessee General Services Department's Central Procurement Office\*. When competitive bidding is required, Tennessee Code Annotated § 12-12-111 requires every bid or proposal submitted to a local government for goods or services to include the following statement, subscribed or affirmed by the bidder as true under the penalty of perjury:

**CERTIFICATION**

By submission of this bid, each bidder and each person signing on behalf of any bidder certifies, and in the case of a joint bid each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each bidder is not on the list created pursuant to T.C.A. § 12-12-106.

  
\_\_\_\_\_  
Signature

02/09/2021  
\_\_\_\_\_  
Date

Stephanie Santander  
\_\_\_\_\_  
Printed Name

Stephanie Santander  
\_\_\_\_\_  
Title

CDW Government LLC  
\_\_\_\_\_  
Name of Firm/Company

\*[https://tn.gov/assets/entities/generalservices/cpo/attachments/List\\_of\\_persons\\_pursuant\\_to\\_Tenn.\\_Code\\_Annotation\\_12-12-106.\\_Iran\\_Divestment\\_Act-July.pdf](https://tn.gov/assets/entities/generalservices/cpo/attachments/List_of_persons_pursuant_to_Tenn._Code_Annotation_12-12-106._Iran_Divestment_Act-July.pdf)



# Attachments





# CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)  
10/08/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Aon Risk Services Central, Inc. Chicago IL office 200 East Randolph Chicago IL 60601 USA	<b>CONTACT NAME:</b> PHONE (A/C. No. Ext): (866) 283-7122      FAX (A/C. No.): (800) 363-0105		
	<b>E-MAIL ADDRESS:</b>		
<b>INSURED</b> CDW Corporation 200 North Milwaukee Avenue Vernon Hills IL 60061 USA	<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
	INSURER A: Travelers Property Cas Co of America		25674
	INSURER B: The Phoenix Insurance Company		25623
	INSURER C: The Charter Oak Fire Insurance Company		25615
	INSURER D: Lloyd's Syndicate No. 2623		AA1128623
	INSURER E:		
INSURER F:			

**COVERAGES**      **CERTIFICATE NUMBER:** 570084469205      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS. Limits shown are as requested

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
B	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:			6605D53096A see addendum	10/01/2020	10/01/2021	EACH OCCURRENCE	\$1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$1,000,000
							MED EXP (Any one person)	\$10,000
							PERSONAL & ADV INJURY	\$1,000,000
							GENERAL AGGREGATE	\$2,000,000
							PRODUCTS - COMPIOP AGG	\$2,000,000
C	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY			BA-6N190234	10/01/2020	10/01/2021	COMBINED SINGLE LIMIT (Ea accident)	\$1,000,000
							BODILY INJURY (Per person)	
							BODILY INJURY (Per accident)	
							PROPERTY DAMAGE (Per accident)	
A	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION			CUP6J538679 SIR applies per policy terms & conditions	10/01/2020	10/01/2021	EACH OCCURRENCE	\$5,000,000
							AGGREGATE	\$5,000,000
							Retained Limit	\$10,000
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	UB8P79604A2051K AOS UB8P8306872051R AZ, MA, WI	10/01/2020	10/01/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH	
A					10/01/2020	10/01/2021	E.L. EACH ACCIDENT	\$1,000,000
							E.L. DISEASE-EA EMPLOYEE	\$1,000,000
							E.L. DISEASE-POLICY LIMIT	\$1,000,000
D	E&O-MPL-Primary			W19A8C200601 Cyber Liab & Network Sec. SIR applies per policy terms & conditions	10/01/2020	10/01/2021	Each Loss	\$5,000,000
							SIR	\$500,000
							Aggregate	\$5,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 Evidence of Coverage. Named Insured includes: CDW Government LLC, CDW LLC, CDW Direct LLC, CDW Logistics LLC, CDW Technologies LLC and CDW Finance Corporation.

<b>CERTIFICATE HOLDER</b>	<b>CANCELLATION</b>
CDW Corporation 200 North Milwaukee Avenue Vernon IL 60061 USA	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE  <i>Aon Risk Services Central, Inc</i>

Holder Identifier :

570084469205

Certificate No :



## ADDITIONAL REMARKS SCHEDULE

<small>AGENCY</small> Aon Risk Services Central, Inc.		<small>NAMED INSURED</small> CDW Corporation	
<small>POLICY NUMBER</small> See Certificate Number: 570084469205			
<small>CARRIER</small> See Certificate Number: 570084469205	<small>NAIC CODE</small>	<small>EFFECTIVE DATE</small>	

**ADDITIONAL REMARKS**

**THIS ADDITIONAL REMARKS FORM IS A SCHEDULE TO ACORD FORM,**  
**FORM NUMBER: ACORD 25    FORM TITLE: Certificate of Liability Insurance**

Commercial General Liability

Commercial General Liability  
 Policy# 6605D53096A  
 State and Insurer(s) Affording Coverage

California	Travelers Property Casualty Company of America	NAIC# 25674
All other	The Phoenix Insurance Company	NAIC# 25623



75 Tri-State International  
Lincolnshire, IL 60069

CDW.com

January 1, 2021

To CDW Government LLC Customers:

CDW Government LLC is your supplier/vendor. CDW Government LLC's FEIN is 36-4230110. This is the number displayed on our invoices.

CDW Government LLC is treated as a disregarded entity for federal income tax purposes. The Internal Revenue Service requires the W-9 to be completed by an entity that is not a disregarded entity for federal tax purposes. For CDW Government LLC, that entity is the parent corporation, CDW LLC, FEIN 36-3310735. Consequently, CDW Government LLC's W-9 lists CDW LLC as the "Name (as shown on the income tax return)" and the "Business name" as CDW Government LLC.

The address on our W-9, (230 N. Milwaukee Ave. Vernon Hills, IL 60061), is our mailing address registered with the IRS. CDW Government LLC requests your payments to be mailed to another address, (75 Remittance Dr, Suite 1515, Chicago, IL 60675). This is merely for payment processing and is not a CDW Government LLC physical location.

We apologize for any confusion our organizational structure may cause you; however, we have completed the W-9 as required by the Internal Revenue Service.

Please feel free to contact us at [taxteam@cdw.com](mailto:taxteam@cdw.com) should you have any questions or require additional documentation.

Thank you,

CDW Tax Department

## Request for Taxpayer Identification Number and Certification

**Give Form to the  
requester. Do not  
send to the IRS.**

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

<b>Print or type.</b>  <b>See Specific Instructions on page 3.</b>	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>CDW LLC</b>		
	2 Business name/disregarded entity name, if different from above <b>CDW Government LLC, CDW Government</b>		
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.		4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate		Exempt payee code (if any) <u>5</u>
	<input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ <u>C</u> <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.		Exemption from FATCA reporting code (if any) <u>N/A</u>
	<input type="checkbox"/> Other (see instructions) ▶		<i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) See instructions. <b>230 N Milwaukee Avenue</b>		Requester's name and address (optional)
6 City, state, and ZIP code <b>Vernon Hills, IL 60061</b>			
7 List account number(s) here (optional)			

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
or									
Employer identification number									
3	6	-	3	3	1	0	7	3	5

### Part II Certification

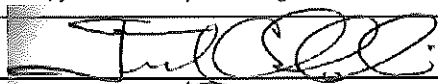
Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

**Sign Here**

Signature of U.S. person ▶



Date ▶ **01/01/2021**

## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*

**Appointment of Authorized Representative with Limited Signing Authority**

In accordance with the authority delegated to the undersigned, Robert F. Kirby, President, CDW Government LLC (“Company”), the undersigned hereby delegates to Stephanie Santander (“Authorized Representative”) holding the title, Director, Program Sales (“Authorized Title”), of Company or its affiliate, the authority solely to review and execute certain Contract documents, subject to certain limitations, as set forth in the table below (“Restricted Authority”).

<b>Contract Types:</b> <i>select type of agreement (one or more may apply)</i>	<input type="checkbox"/>	Agreements and purchase orders related to marketing.
	<input type="checkbox"/>	Nondisclosure and other forms of confidentiality agreements and non-binding letters of intent in connection with potential M&A opportunities.
	<input checked="" type="checkbox"/>	Non-disclosure and other forms of confidentiality agreements with customers and partners.
	<input checked="" type="checkbox"/>	Agreements with customers to provide IT products and professional services (to the extent such services are authorized by the undersigned), and all such accompanying forms (attestations and disclosures) that are generally required to form a complete contract including memorandums of understanding, and subcontracts with partners on the Agreements described above, but excluding software beta test and early adoptee agreements, and any agreements out of the ordinary course of Company's business.
	<input checked="" type="checkbox"/>	Bids & Proposals to provide IT products and professional services, (to the extent such services are authorized by the undersigned), and all such accompanying forms (attestations and disclosures) that are generally required to form a complete offer for contract package, but excluding software beta test and early adoptee offers, and any offer out of the ordinary course of Company's business.
	<input type="checkbox"/>	SOWs and Change Orders with customers to provide IT professional services (to the extent such services are authorized by the undersigned), but excluding software beta test and early adoptee contracts, and any contracts out of the ordinary course of Company's business.
	<input type="checkbox"/>	Agreements with partners to purchase IT products and professional services (to the extent such services are authorized by the undersigned), but excluding software beta test and early adoptee agreements, and any agreements out of the ordinary course of Company's business.
	<input checked="" type="checkbox"/>	Agreements, including but not limited to, Participation Agreements and Teaming Agreements with Partners/Vendors to provide IT products and professional services to customers (to the extent such services are authorized by the undersigned), but excluding agreements for software beta test and early adoptee agreements, and any agreements out of the ordinary course of Company's business.
	<input type="checkbox"/>	SOWs with Partners/Vendors to provide IT professional services to Customers (to the extent such services are authorized by the undersigned), but excluding agreements for software beta test and early adoptee agreements, and any agreements out of the ordinary course of Company's business.
<b>Check other:</b>	<input type="checkbox"/>	[Click to fill in description]
<b>Territorial Limit</b>	U.S. Only	
<b>Not to Exceed Dollar Value Limit</b>	Up to <del>\$\$\$25,000,000</del> . (This is total value, not annual value, of a contract.)	
<b>Not to Exceed Contract Duration for Services</b>	Up to ten (10) year(s)	
<b>Required Approvals and Other Conditions</b>	<ul style="list-style-type: none"> <li>• Compliance with Company Legal Department mandated contract review process.</li> <li>• Compliance with Company policies.</li> <li>• Capital expenditures approval, if applicable.</li> <li>• Chief Legal Officer review if Contract is with any principal stockholder, director or officer (or immediate family member) of a CDW company.</li> <li>• Treasurer review of any grant of a security interest or lien.</li> <li>• Legal approval of any contract with a foreign entity.</li> <li>• Delegation in the Agiloft tool as backup for you while out must only be provided to an individual coworker with the same title and level of signing authority as you, or your manager.</li> </ul>	

[Signature Page Follows]

Authorized Representative shall use the following signature block, or one that indicates in a substantially similar manner that the Authorized Representative is authorized when executing Contracts on behalf of Company:

CDW Government LLC

By: Stephanie Santander, its Authorized Representative

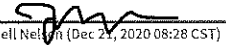
This appointment is effective on the date specified below and shall remain in effect until the earliest of: (a) the date, December 31, 2023, when this Restricted Authority expires; (b) the date when the Authorized Representative no longer holds the Authorized Title; or (c) the date when the Restricted Authority is terminated by the undersigned. Authorized Representative may not assign or delegate the Restricted Authority to any other person.

Effective Date January 1, 2021:



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Robert F. Kirby  
President  
CDW Government LLC

  
Janell Nelsen (Dec 21, 2020 08:28 CST)

Received and Approved by Corporate Paralegal:

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Janell Nelsen

Received and Approved by the Corporate Secretary's Office:

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Mary Jo Georgen



# Oak Ridge Schools

OFFICE OF  
Finance Director

Telephone (865) 425-9004

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## MEMORANDUM

**To:** Dr. Bruce Borchers, Superintendent of Schools

**From:** Pat Smith, Finance Director *PS*

**Subject:** Approval of Cal-First Four-Year Master Technology Equipment Lease

**Date:** February 15, 2021

I recommend approval of a Cal-First Four Year Master Equipment Lease valued at \$1,650,000 for use on the "Access Oak Ridge Technology Project" technology refresh of student devices in Grades 5-12.

The FY21 Budget Amendment #1 contains a revenue and expenditure placeholder for implementation of the Cal-First Lease of \$1,720,700 (Equipment Purchase plus interest cost). Funds to support the first lease payment due at the inception of the lease (March, 2021) of \$430,175 is included in FY21 Budget Transfer #4 under the "Debt Service" function of the General Fund Budget.

Going forward the three remaining \$430,175 annual payments will be due each year in March and will be budgeted under the "Debt Service" function in each annual Budget Document.

This capital lease will be for the purchase of 1,729 student devices for partial student refresh of Grades 5-12. Purchase will be made from a competitive bid per Oak Ridge School's purchasing policies, and will require Board of Education approval.

The attached Quote, authorizing Cal-First to move forward with preliminary processing only, was reviewed and approved by the school district's attorney. All final lease document(s) will align with the Quote Proposal Specifications and will be subject to school district attorney review and approval prior to finalization.



# California First Leasing Corporation

## Government and Education Group

Ms. Pat Smith  
Finance Director  
Oak Ridge Schools  
304 New York Ave  
Oak Ridge, TN 37830

January 28, 2021

Dear Pat,

California First Leasing Corporation is pleased to provide Oak Ridge Schools with the following revised leasing proposal. Please understand that this proposal is expressly subject to the final review and approval of California First Leasing Corporation's Finance Committee. Final terms and conditions shall be established pursuant to written lease documentation duly signed by the parties.

**LESSEE:** Oak Ridge Schools

**LESSOR:** California First Leasing Corporation

**PROPERTY:** Lenovo computer equipment (approximately 1,900 devices)

**FUNDING DATE:** On or after March 1, 2021

**ISSUE TYPE:** Tax-exempt lease purchase financing, subject to annual appropriation

**LEASE TYPE:** Municipal Lease

**BILLING:** Annual in advance (1<sup>st</sup> payment due upon funding)

<b>TOTAL PROPERTY COST:</b> (approximate)	\$1,650,000.00
<b>TERM:</b>	4 Years
<b>PAYMENT:</b>	\$430,175.00

**RATE INDEXING:** This quote is subject to credit approval, final documentation and qualification as tax-exempt. The payment is valid until anticipated funding date, indexed upward at that point to the 4-year US Treasury Rate, currently at 0.32%.

**DOCUMENTATION:** It is anticipated that the transaction will be documented via a lease and related documents provided by Lessor. Included in the documents will be a covenant by Lessee that 100% of the project costs will be considered a capitalizable asset for the term of the lease. This proposal is subject to the negotiation of all-final lease documents and additional documentation, which may be required.

**BANK QUALIFIED:** Lessee will designate the Lease/Purchase as a "qualified tax-exempt obligation" within the meaning of Section 265(b)(3) of the IRS Tax Code. The Lessee does not reasonably expect to issue more than \$10,000,000.00 of obligations in the calendar year as Lease/Purchase. Should the bank qualified status of this lease change, Lessor reserves the right to adjust the proposed interest rate.

**ESCROW ACCOUNT:** If necessitated by the project implementation schedule, the proceeds of the financing will be deposited in an escrow account established with a mutually acceptable bank or trust company (the "Escrow Agent"). The Escrow Agent will administer the investment of the escrow funds during the project implementation period, as directed by Lessee, and as defined by relevant law and the Escrow Agreement. Any interest earned on such investments shall be for the benefit of Lessee and may be used for project costs.

**PREPAYMENT TERMS:** On any payment date, at the remaining principal balance outstanding plus 2%.



**California First Leasing Corporation**

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Letter to Ms. Pat Smith  
Re: [Revised] Oak Ridge Schools Lease Financing  
January 28, 2021  
Page 2

**FEES OR CLOSING COST:** None other than those listed herein, however Lessee will be responsible for any fees or expenses with respect to (i) the issuing costs; (ii) Lessee's legal counsel, if any; (iii) escrow agent fees (if applicable); and (iv) tax opinion (if applicable).

**OTHER MATTERS:** This proposal is subject to the negotiation of final documentation, project due diligence and credit approval by Lessor.

On behalf of California First Leasing Corp, we appreciate the opportunity to continue to earn Oak Ridge School's business and look forward to a long and mutually rewarding business relationship. I will be in contact shortly to review this lease proposal with you and answer any questions that you may have. If you need to reach me for any reason please call (800) 496-4838 x 600 or send an e-mail to [apaddon@calfirstlease.com](mailto:apaddon@calfirstlease.com).

Sincerely,  
Andrew Paddon  
Vice President

Acknowledged, Accepted, and Agreed to:

Oak Ridge Schools

By: *Bruce Borchers*

Name: *Bruce Borchers*

Title: *Superintendent*

Date: *2.9.21*

# FY21 One-time Employee Bonus Proposal

## FY21 BEP Legislative Action (Appropriations Bill SB7009/HB7020)

One-time BEP funding - total allocation includes salary and benefits that are to be distributed at the discretion of the District to eligible staff only.

See attached Teacher Pay Summary and FAQ for additional information

### 1. Propose that this BEP allocation be used to provide a one-time bonus for eligible staff (as outlined by the appropriations bill as instructional positions as listed in the BEP Blue Book)

As noted in the attached Teacher Pay Summary "The 2% increase to the instructional component of the BEP is not equivalent to a 2% salary increase for all teachers"

**Positions to receive this one time bonus:** Teachers, Counselors, Principals, Assistant Principals, Instructional Supervisors, Social Workers, Psychologists, Nurses

### Statistics Regarding BEP Funding for Oak Ridge Schools - BEP

2% Increases do not equate to 2% increase at District Level

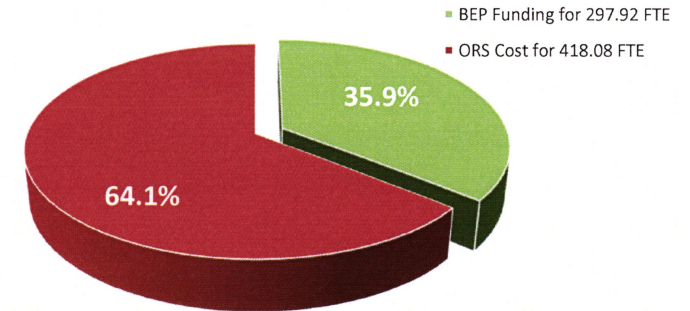
FY21 BEP Funding covers only 297.92 Instructional FTE Positions at 73.85% of \$47,134 salary (\$34,808.46/each FTE)

District employs 418.08 FTE at an average salary of \$69,091

**\$ 191,000.00** One-time Allocation through State BEP

**\$400** for each FTE (less deductions)

Instructional Positions - Total BEP Funding as Percentage of Total Average Salary Costs



### 2. Propose that all Non-Instructional Staff - receive same one-time bonus (to be funded by the District)

Cost to District (funding to come from Contingency Funds)

**\$400** for each FTE (less deductions)

**\$113,150.44** Total Cost



# Teacher Pay

## Summary of Teacher Pay in the Appropriations Bill *for Districts and School Board Partners*

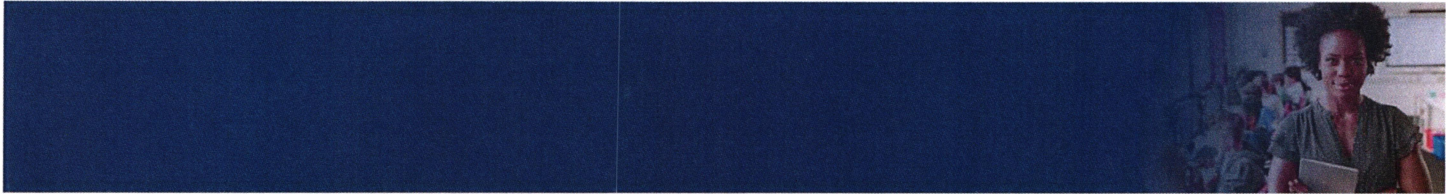
On January 22, 2021, during the 1st Extraordinary Session of the 112th General Assembly, the Tennessee General Assembly passed an Appropriations Bill (SB7009/HB7020), which included critical pay increases for Tennessee teachers during an unprecedented school year impacted by the COVID-19 pandemic.

We all know educators are critical for the success and safety of students. Throughout these unprecedented times, Tennessee teachers and districts continue to rise to the occasion to meet the needs of all students and provide them with a quality education. Educators are working especially hard through the pandemic to adapt to new challenges, dynamics, and instructional environments.

By passing this appropriations bill recommended by Governor Lee, the General Assembly appropriated funding to provide an increase equivalent to a 2% increase of the instructional component of the BEP for this school year (dating back to January 1, 2021). This funding includes the state fully covering the local match for an equivalent 2% increase. It will be up to you at the district-level to decide how this increased funding is dispersed for district instructional staff.

The 2% increase to the instructional component of the BEP is not equivalent to a 2% salary increase for all teachers. The exact amount of money available for educator salaries and/or bonuses has been sent to districts and will be distributed at their discretion.

In addition to this one-time increase, Governor Lee has already committed to proposing a recurring 4% increase in the instructional component of the BEP to begin next fiscal year. This investment will provide significant funding to support districts as they provide instructional salary increases for teachers.



# Teacher Pay

## 2020-21 Teacher Pay FAQs

On January 22, 2021, during the 1st Extraordinary Session of the 112th General Assembly, the Tennessee General Assembly passed an **Appropriations Bill** (SB7009/HB7020), which included critical pay increases for Tennessee teachers during an unprecedented school year impacted by the COVID-19 pandemic.

### General Questions:

**1. Why are these funds listed as “non-recurring” in the appropriations legislation?**

Any additional appropriations added within a fiscal year are always listed as non-recurring. Funds with recurring purposes will be added during the regular budget cycle for the following fiscal year.

**1. Does the current appropriations legislation actually change the unit cost of the instructional positions component?**

No. However, the calculation is based on the equivalent to a 2% increase to the unit cost of the instructional positions component in the BEP formula. The reason the actual unit cost is not formally changed from this increase is because the state is covering both the state and local share for this increase in FY21.

**2. Can you explain what the 2% covers?**

The 2% is based on the funding available for the instructional salaries component of the BEP. This does not necessarily equal 2% of what districts are spending on educator salaries, as many districts hire additional staff beyond what the BEP covers. The additional funding provided should not be described as a “2% salary increase.”

**3. Does dating the funds back to Jan 1. mean we only get half the funds?**

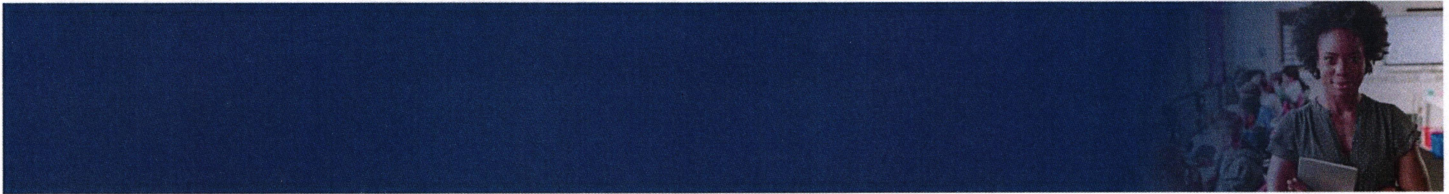
No. Funds provided to districts will reflect this increase for the period of January 1 to June 30, and full funding for that period is being provided.

**4. Am I required to change my salary and compensation schedule at this time?**

This is a district decision. Districts are required to document how funds are being distributed and share this information along with their salary and compensation schedule. This may or may not be a change to a district’s standard salary schedule.

**5. How does this impact charter schools?**

Charter schools will continue to be funded following the average per pupil funding provided to the district (per TCA 49-13-112(a)). As these funds will



increase that average funding, charters will experience increased funding as a result.

**6. If we gave an increase at the beginning of this school year, even though the state did not, can we use these funds to offset those increases?**

No. These funds are intended to provide new increases for teachers and certified personnel.

**7. How does this impact teachers funded outside of the BEP formula?**

Districts have discretion in determining how to distribute these funds to teachers. The allocations support increased funding to teachers, regardless of whether those teachers are funded within or outside the BEP. Districts may opt to distribute a share of what they receive to all teachers within the district or develop other strategies for disbursement.

**8. How can I use my BEP summary spreadsheet to explain how funds are awarded?**

In general, the increase will equate to an increase to the instructional salaries component of the BEP and the relevant benefits (social security, Medicare, and retirement) in the instructional benefits categories. However, due to other components within the BEP being tied to these values, districts will likely see increases in other categories as well. It is important to note that these funds are being awarded outside of the BEP formula. While the BEP summary spreadsheet may assist in understanding the allocations, it does not dictate spending requirements on these funds. Districts may want to share the total amount of funding provided to the district and then transparently post how those funds were allocated.

**9. Will this become recurring next year?**

The Governor has signaled he will propose a 4% increase in recurring funding for the instructional salaries component of the BEP in his FY22 budget. This will be released in mid-February.



# Oak Ridge Schools

OFFICE OF  
Finance Director

Telephone (865) 425-9004

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## MEMORANDUM

**To:** Dr. Bruce Borchers, Superintendent of Schools  
**From:** Pat Smith, Finance Director *PS*  
**Subject:** FY'21 Budget Amendment #1  
**Date:** February 16, 2021

The attached FY'21 Budget Amendment #1 includes the following budget additions for the Board of Education approval.

- **General Fund**
  - Capital Lease revenue and expenditure value of \$1,650,000 for purchase of Student Devices
  - Summer Learning Camp Grant revenue and expenditure value of \$509,564.09
- **Federal Fund**
  - ESSER 2.0 Grant revenue and expenditure value of \$3,120,709.36

# FY 21 FYTD Budget Summary - Budget Amendment #1

Fund	FY21 Original Approved Budget	Budget Amendment #1	Budget Transfers July 1, 20 - Feb 16, 21	FY21 Amended Budget Amounts
Fund 141 (General Fund)	\$ 61,154,449.00	\$ 2,159,564.09	\$ (197,428.64)	\$ 63,116,584.45
Fund 142 (Federal)	\$ 4,798,134.00	\$ 3,120,709.36	\$ 194,998.26	\$ 8,113,841.62
Fund 143 (Food Service)	\$ 2,508,891.00			\$ 2,508,891.00
Fund 145 (Other Education)	\$ 236,719.00		\$ 2,430.38	\$ 239,149.38
Fund 146 (Extended Child Care)	\$ 456,651.00			\$ 456,651.00
<b>TOTAL All Funds</b>	<b>\$ 69,154,844.00</b>	<b>\$ 5,280,273.45</b>	<b>\$ (0.00)</b>	<b>\$ 74,435,117.45</b>

## Fund 141 Budget Amendment

Fund 141 REVENUES	Account Number	Decrease	Increase
Establish Capital Lease Budget - Student Devices	141 R 49300 000 000 00000 000	\$ -	\$ 1,650,000.00
Establish Summer Learning Camp Budgets	141 R 46980 000 000 00000 000	\$ -	\$ 509,564.09
Fund 141 EXPENDITURES	Account Number	Increase	Decrease
Establish Capital Lease Budget - Student Devices	141 E 71100 722 000 00000 233	\$ 1,650,000.00	\$ -
Establish Summer Learning Camp Budgets	141 E 71900 000 000 00000 000	\$ 509,564.09	\$ -
<b>TOTAL</b>		<b>\$ 2,159,564.09</b>	<b>\$ 2,159,564.09</b>

## Fund 142 Budget Amendment

Fund 142 REVENUES	Account Code	Decrease	Increase
Establish ESSER 2.0 Grant Budget	142 R 47590 000 000 00000 000	\$ -	\$ 3,120,709.36

FUND 142 EXPENDITURES		Increase	Decrease
Establish ESSER 2.0 Grant Budget	142 E 71100 722 935 00000 000	\$ 1,045,709.36	\$ -
	142 E 72130 790 935 00000 000	\$ 575,000.00	\$ -
	142 E 76100 707 935 00000 000	\$ 1,500,000.00	\$ -

<b>TOTAL</b>	<b>\$ 3,120,709.36</b>	<b>\$ 3,120,709.36</b>
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# Oak Ridge Schools

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Finance Director

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<b>TOTAL</b>	<b>\$ 3,120,709.36</b>	<b>\$ 3,120,709.36</b>
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# Oak Ridge Schools

OFFICE OF  
Finance Director

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## MEMORANDUM

**To:** Dr. Bruce Borchers, Superintendent of Schools  
**From:** Pat Smith, Finance Director *PS*  
**Subject:** **FY'21 Budget Transfer #4**  
**Date:** February 15, 2021

The attached FY'21 Budget Transfer #4 includes the following budget transfer requests for Board of Education approval:

- Establish \$191,000 Legislative BEP Action (one-time funding) bonus for instructional staff only (\$400/each)
- Establish \$113,000 one-time bonus for all other district staff (not included in BEP Legislative Action...these funds are from the General Fund Contingency) (\$400/each)
- Establish budget for \$430,175 Capital Lease Payment due at inception of Lease (from General Fund Contingency)
- Establish budget for \$8,641.91 purchase of Preschool Sign (outdoor) and plaques (indoor) (from General Fund Contingency)

# FY 21 FYTD Budget Summary - Budget Transfer #4

Fund	FY21 Original Approved Budget	Budget Transfer #1, #2, & #3	FY21 Revised Budget Total
Fund 141 (General Fund)	\$ 61,154,449.00	\$ (197,428.64)	\$ 60,957,020.36
Fund 142 (Federal)	\$ 4,798,134.00	\$ 194,998.26	\$ 4,993,132.26
Fund 143 (Food Service)	\$ 2,508,891.00		\$ 2,508,891.00
Fund 145 (Other Education)	\$ 236,719.00	\$ 2,430.38	\$ 239,149.38
Fund 146 (Extended Child Care)	\$ 456,651.00		\$ 456,651.00
<b>TOTAL All Funds</b>	<b>\$ 69,154,844.00</b>	<b>\$ (0.00)</b>	<b>\$ 69,154,844.00</b>

## Fund 141 Budget Transfers

Fund 141 REVENUES	Account Number	Decrease	Increase
Fund 141 EXPENDITURES	Account Number	Increase	Decrease
Transfer from Contingency for Capital Lease Payment #1	141 E 82130 000 000 00000 000	\$ 430,175.00	\$ -
	141 E 71900 599 000 00000 004	\$ -	\$ 430,175.00
Transfer from Contingency for TN Legislative Action Instructional Staff 1 Time Bonus	141 E 71100 188 000 00000 010	\$ 191,000.00	\$ -
	141 E 71900 599 000 00000 004	\$ -	\$ 191,000.00
Transfer from Contingency for Other Staff 1 Time Bonus	141 E 71100 188 000 00000 000	\$ 113,150.44	\$ -
	141 E 71900 599 000 00000 004	\$ -	\$ 113,150.44
Transfer from Contingency for Signage & Plaques at Preschool	Outdoor Signage 141 E 76100 707 000 00000 000	\$ 3,165.91	\$ -
	Indoor Plaques 141 E 76100 707 000 00000 000	\$ 5,476.00	
	141 E 71900 599 000 00000 004	\$ -	\$ 8,641.91
<b>TOTAL</b>		<b>\$ 742,967.35</b>	<b>\$ 742,967.35</b>



# Oak Ridge Schools

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## MEMORANDUM

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# FY 21 FYTD Budget Summary - Budget Transfer #4

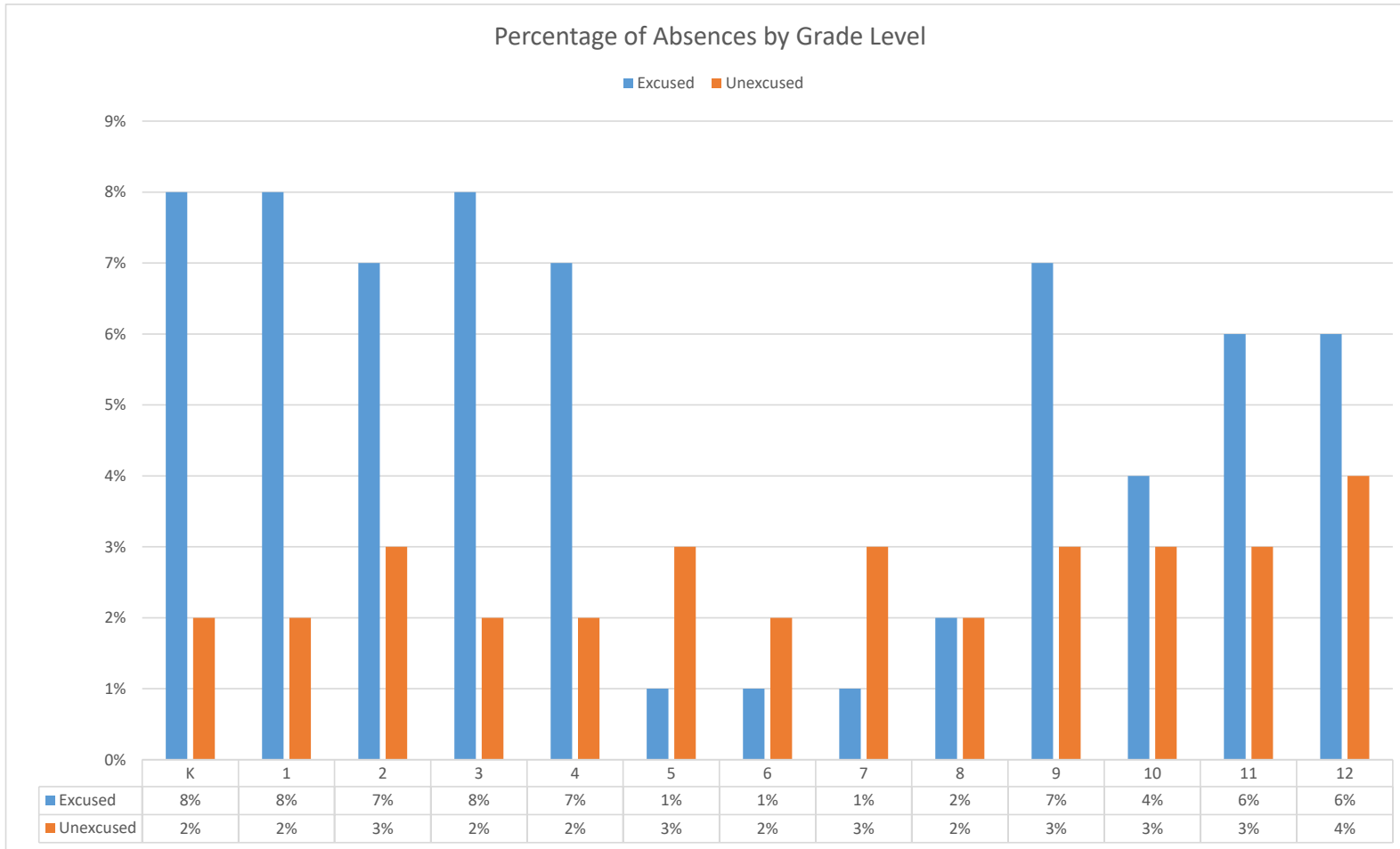
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<b>TOTAL All Funds</b>	<b>\$ 69,154,844.00</b>	<b>\$ (0.00)</b>	<b>\$ 69,154,844.00</b>

## Fund 141 Budget Transfers

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Fund 141 EXPENDITURES	Account Number	Increase	Decrease
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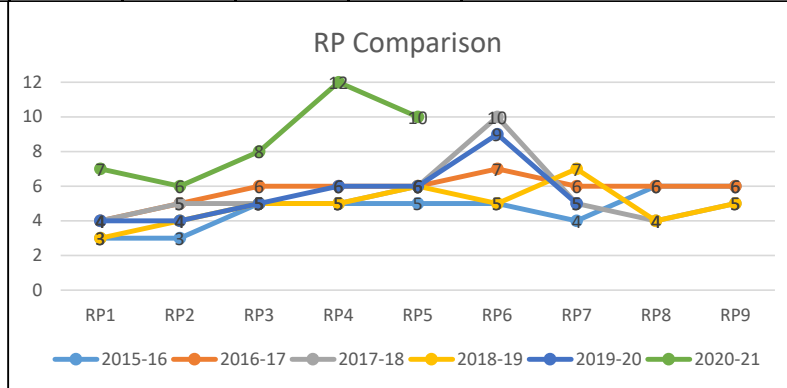
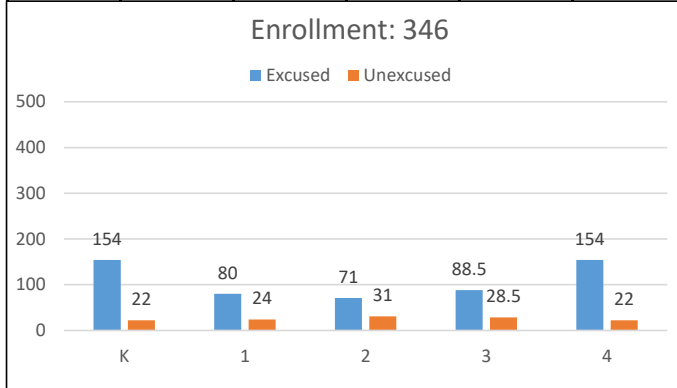
# Attendance Graphs

The graphs below display excused and unexcused absence totals, total enrollment, and attendance percentages by grade and reporting period.  
 The data was compiled using information from attendance detail and summary reports and entity counts reports.  
 Reporting Period 4: 12/9/2020-1/21/2020



2015-16	RP1: 3%	RP2: 3%	RP3: 5%	RP4: 5%	RP5: 5%	RP6: 5%	RP7: 4%	RP8: 6%	RP9: 6%
2016-17	RP1: 4%	RP2: 5%	RP3: 6%	RP4: 6%	RP5: 6%	RP6: 7%	RP7: 6%	RP8: 6%	RP9: 6%
2017-18	RP1: 4%	RP2: 5%	RP3: 5%	RP4: 5%	RP5: 6%	RP6: 10%	RP7: 5%	RP8: 4%	RP9: 5%
2018-19	RP1: 3%	RP2: 4%	RP3: 5%	RP4: 5%	RP5: 6%	RP6: 5%	RP7: 7%	RP8: 4%	RP9: 5%
2019-20	RP1: 4%	RP2: 4%	RP3: 5%	RP4: 5.6%	RP5: 6%	RP6: 8.8%	RP7: 4.9%	Covid-19	Covid-19
2020-21	RP1: 7.3%	RP2: 5.8%	RP3: 8.1%	RP4: 11.6%	RP5: 9.9%				

# Glenwood

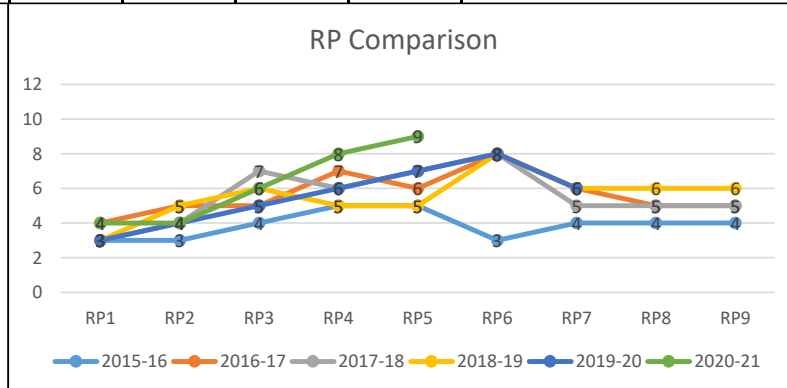
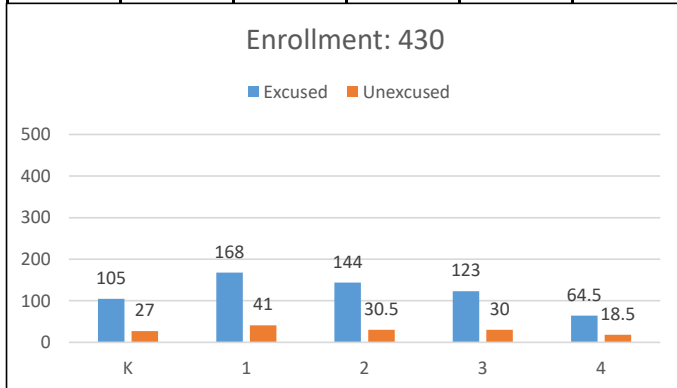


Goal

5.5

2015-16	RP1: 3%	RP2: 3%	RP3: 4%	RP4: 5%	RP5: 5%	RP6: 3%	RP7: 4%	RP8: 4%	RP9: 4%
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2018-19	RP1: 3%	RP2: 5%	RP3: 6%	RP4: 5%	RP5: 5%	RP6: 8%	RP7: 6%	RP8: 6%	RP9: 6%
2019-20	RP1: 3%	RP2: 4%	RP3: 5%	RP4: 5.6%	RP5: 6.8%	RP6: 7.7%	RP7: 6.4%	Covid-19	Covid-19
2020-21	RP1: 4.3%	RP2: 4.3%	RP3: 6.1%	RP4: 7.7%	RP5: 9.1%				

# Linden

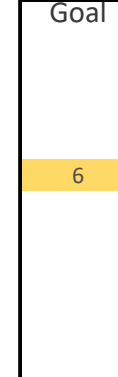
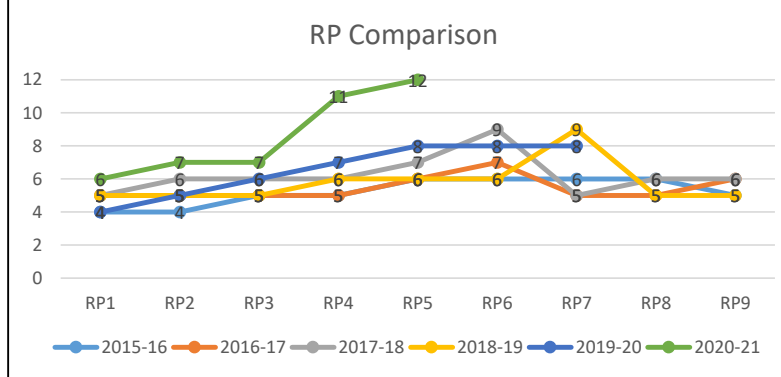
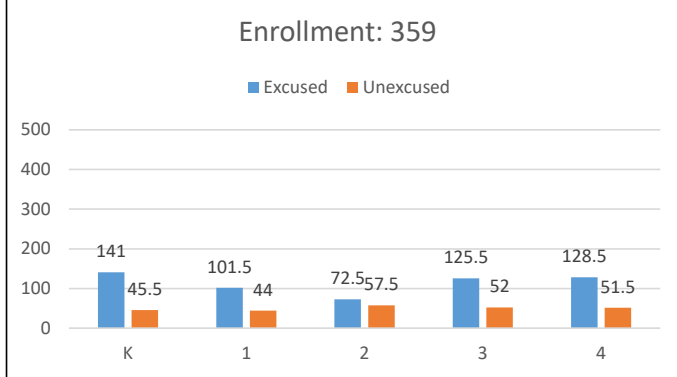


Goal

5

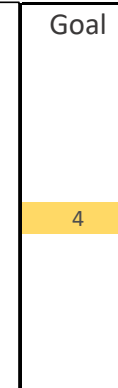
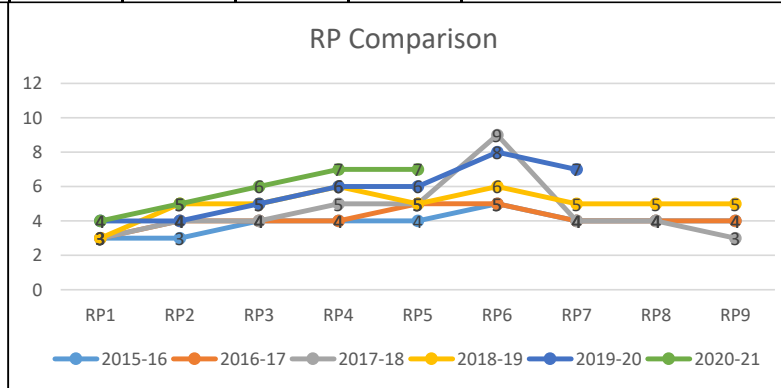
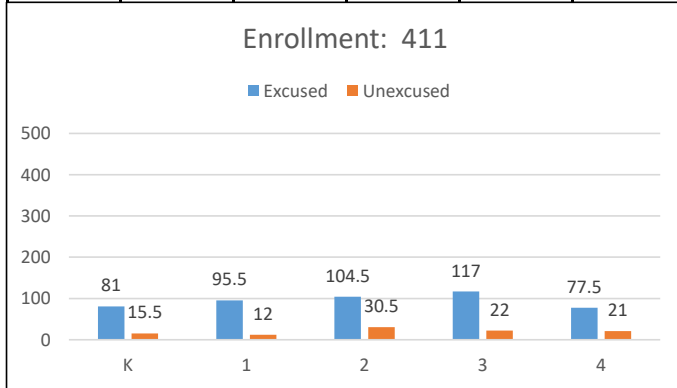
2015-16	RP1: 4%	RP2: 4%	RP3: 5%	RP4: 5%	RP5: 6%	RP6: 6%	RP7: 6%	RP8: 6%	RP9: 5%
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2017-18	RP1: 5%	RP2: 6%	RP3: 6%	RP4: 6%	RP5: 7%	RP6: 9%	RP7: 5%	RP8: 6%	RP9: 6%
2018-19	RP1: 5%	RP2: 5%	RP3: 5%	RP4: 6%	RP5: 6%	RP6: 6%	RP7: 9%	RP8: 5%	RP9: 5%
2019-20	RP1: 4%	RP2: 5%	RP3: 6%	RP4: 6.6%	RP5: 7.8%	RP6: 8.4%	RP7: 7.5%	Covid-19	Covid-19
2020-21	RP1: 6.1%	RP2: 7.1%	RP3: 7.3%	RP4: 11%	RP5: 11.7%				

# Willow Brook



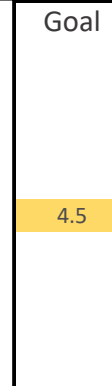
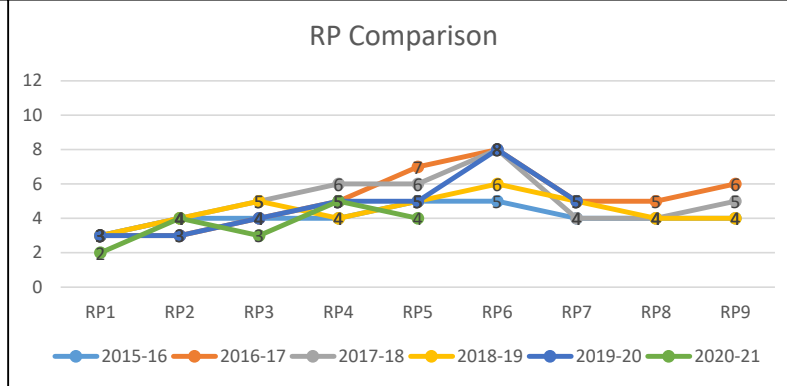
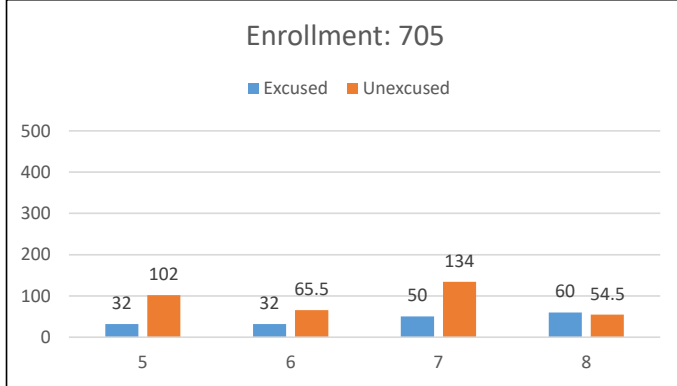
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2017-18	RP1: 3%	RP2: 4%	RP3: 4%	RP4: 5%	RP5: 5%	RP6: 9%	RP7: 4%	RP8: 4%	RP9: 3%
2018-19	RP1: 3%	RP2: 5%	RP3: 5%	RP4: 6%	RP5: 5%	RP6: 6%	RP7: 5%	RP8: 5%	RP9: 5%
2019-20	RP1: 4%	RP2: 4%	RP3: 5%	RP4: 5.6%	RP5: 6.2%	RP6: 8.4%	RP7: 6.6%	Covid-19	Covid-19
2020-21	RP1: 4.1%	RP2: 4.9%	RP3: 6.2%	RP4: 7.1%	RP5: 7.1%				

# Woodland



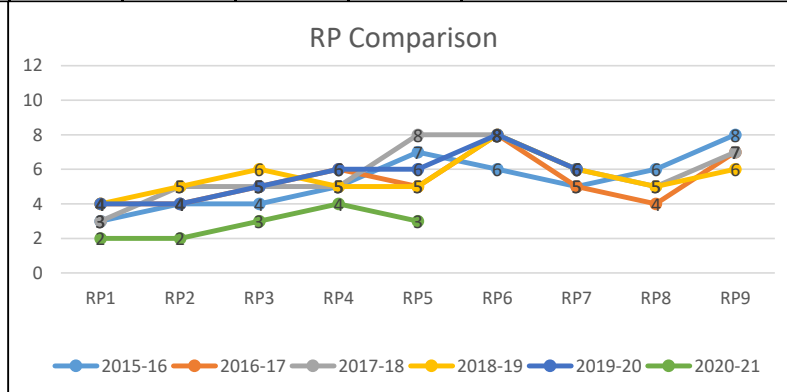
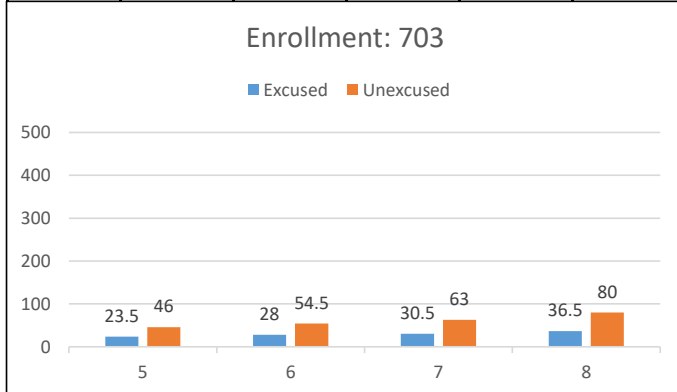
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2016-17	RP1: 3%	RP2: 3%	RP3: 4%	RP4: 5%	RP5: 7%	RP6: 8%	RP7: 5%	RP8: 5%	RP9: 6%
2017-18	RP1: 3%	RP2: 4%	RP3: 5%	RP4: 6%	RP5: 6%	RP6: 8%	RP7: 4%	RP8: 4%	RP9: 5%
2018-19	RP1: 3%	RP2: 4%	RP3: 5%	RP4: 4%	RP5: 5%	RP6: 6%	RP7: 5%	RP8: 4%	RP9: 4%
2019-20	RP1: 3%	RP2: 3%	RP3: 4%	RP4: 5%	RP5: 4.9%	RP6: 8.4%	RP7: 5.2%	Covid-19	Covid-19
2020-21	RP1: 2.2%	RP2: 4.1%	RP3: 3.4%	RP4: 4.5%	RP5: 3.8%				

# Jefferson



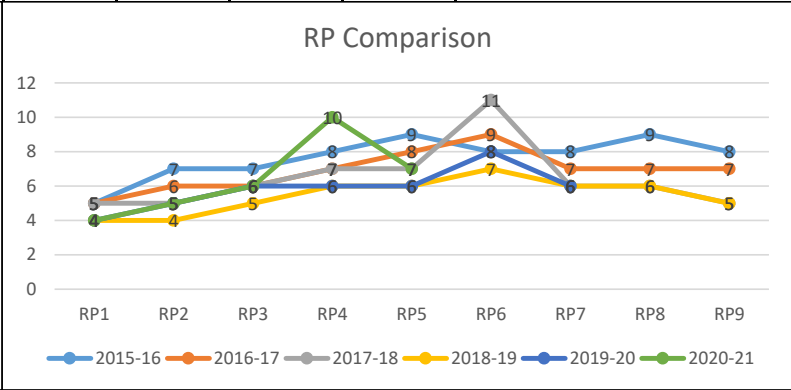
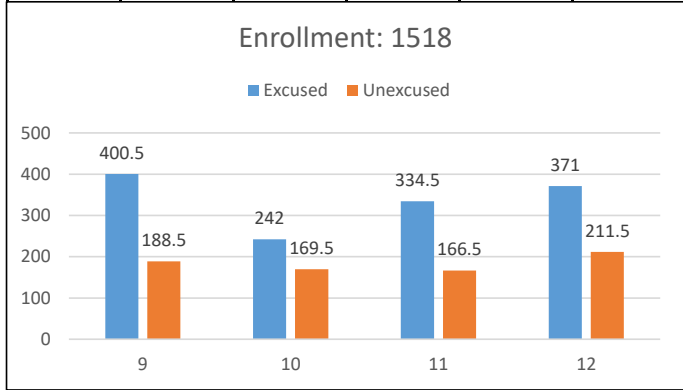
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2017-18	RP1: 3%	RP2: 5%	RP3: 5%	RP4: 5%	RP5: 8%	RP6: 8%	RP7: 6%	RP8: 5%	RP9: 7%
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2020-21	RP1: 2%	RP2: 2.3%	RP3: 3.4%	RP4: 4%	RP5: 2.7%				

# Robertsville



2015-16	RP1: 5%	RP2: 7%	RP3: 7%	RP4: 8%	RP5: 9%	RP6: 8%	RP7: 8%	RP8: 9%	RP9: 8%
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2020-21	RP1: 3.6%	RP2: 4.6%	RP3: 5.5%	RP4: 9.9%	RP5: 6.9%				

# ORHS



**Goal**

6

**Oak Ridge Schools**

**5th Attendance Period**

**January 27, 2021**

These numbers reflect the **2020-2021** Skyward Student Management System (Entity) active student enrollment count as of **January 27, 2021**.

The total includes **22** private school and home schooled students receiving Special Ed services.



# Oak Ridge Schools

## Enrollment Entity Counts 5th RP 2020-21

January 27, 2021

School	P3	P4	K	1	2	3	4	5	6	7	8	9	10	11	12	Total PK-12 2020-21	Previous 4th RP 2020-21	Diff
Preschool	68	99														167	163	4
Glenwood			59	67	72	68	80									346	343	3
Linden			81	103	97	78	71									430	419	11
Willow Brook			78	76	64	69	72									359	356	3
Woodland			86	74	84	82	85									411	411	0
JMS								175	181	178	171					705	706	-1
RMS								173	159	182	189					703	698	5
ORHS												396	381	363	378	1518	1531	-13
<b>Enrollment 2020-21</b>	<b>68</b>	<b>99</b>	<b>304</b>	<b>320</b>	<b>317</b>	<b>297</b>	<b>308</b>	<b>348</b>	<b>340</b>	<b>360</b>	<b>360</b>	<b>396</b>	<b>381</b>	<b>363</b>	<b>378</b>	<b>4639</b>	<b>4627</b>	<b>12</b>
Prev. 4th RP 2020-21	65	98	297	318	315	295	304	345	339	360	360	397	388	365	381	4627		
Difference	3	1	7	2	2	2	4	3	1	0	0	-1	-7	-2	-3	12		

This report compares the 2020-21 5th RP period enrollment with the 2020-21 4th RP period.

Item for Information

Head Start Community Assessment Update 2020-2021

In accordance with Head Start Performance Standards, a community assessment must be conducted every 5 years. This full assessment was conducted prior to the 5 year grant in 2019-2020. For 2020-2021, an annual update must be conducted. This update was conducted as a collaborative effort with the grantee, Policy Committee, and community partners.

The attached Community Assessment Update is for the Board of Education's information.

If there are any questions or concerns, please do not hesitate to contact me.

Respectfully,

Lisa Downard

Principal

Oak Ridge Schools Preschool/Head Start

## Grantee/Delegate 2020-2021 Community Assessment Update

The Anderson Board of Education Head Start (Grantee and Delegate combined) completed a Community Assessment update. The CA teams were set up to match, as closely as possible the membership structure that resembles the original team from the 2019-2020 Community Assessment. Teams were arranged to meet and share information virtually.

Recommendations for goals and objectives for consideration are:

1. Keep updated on CDC and community partner recommendations on providing a safe and healthy environment for staff and children to reduce the risk of COVID and other viruses.
2. Keep up to date with community partners so that appropriate referrals for children and parents are made to support a healthy and safe life.
3. Provide strategies and activities that support good mental health for staff members and families.
4. Provide families and staff with resources to reduce food insecure homes.

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Although the data from our CA 2019-2020 is still relevant with its findings, it does not address the effects of the COVID pandemic which has caused significant changes in the community and families' needs.

1. Program Services: The program closed all classrooms from March 2020. The children were moved to online learning for the remaining of the school year. Along with all educational services, parent trainings, staff trainings and administration moved to virtual. Classrooms reopened in August (the beginning of the 2020-2021 school year) and a reopening plan was created to use as a guide in offering services. This closure had a negative impact on parents that were still getting to work as essential workers and had no child care because child care centers/schools closed initially.
2. There are no changes to the publicly-funded pre-kindergarten. The community's pre-kindergarten needs are met by offering a full school day with an extended hour for working parents and those enrolled in school.
3. There were changes to Public Housing within our community.
  - a. The federal government released funds to community agencies to support families with paying rent if the family had a financial crisis due to COVID.
  - b. HUD halted all evictions beginning in April through July 26. During that time, the public housing authority could not send any eviction letters or add late fees to accounts. The public housing authority did send monthly reminders so tenants would be aware of their balances. Once evictions were reinstated, the public housing authority gave their tenants the option to sign repayment agreements instead of evicting them. No families were evicted during that time. Evictions are now halted again but only for tenants who will certify that their income was lost as a direct result of COVID-19. The public housing authority is only permitted to do emergency work orders at this time. The waiting list is open, and families can stop by anytime during office hours to pick up an application.
4. Rates of Family and Child Homelessness

a. Statewide the number of homeless people decreased. However, homelessness for people in families with children increased 4.7% from 2018-2019.

b. Tennessee Homeless Point-In-Time Count reports (Source: HUD Exchange) that the state saw a decrease in homelessness among parenting youth except for a 1% increase in parenting youth under the age of 18.

c. There was a 12.3% decrease in the number of homeless students served in Anderson County Schools during the 2019-2020 school year compared to 2018-2019 school year.

d. The majority of homeless people served by TORCH did not have an income at the start of the program. Those that did have an income at intake averaged \$501-\$1000 per month, according to the Out Of Reach Fair Market Value vs Income statistics.

e. Anderson County Schools Homeless Data for students shows a decrease in the number of homeless students served in 2019-2020 with around 65 students and a 12.3% decrease in the number of homeless students served during the 2018-2019 school year.

5. Specific negative effects of COVID on the community as reported by Goodwill

a. In the early stages of the pandemic, we were forced to close our stores for approximately six weeks which created a significant loss of revenue. This has continued throughout 2020 due to the reduction of customer traffic in our traditional brick and mortar stores. We've continued to struggle to fill our open positions for a variety of reasons related to the pandemic to include school/daycare closures and general concern from workers about being in the community during this time.

b. Our job training programs are traditionally filled by referrals from partnering agencies that operate out of the American Job Centers and other state offices. The pandemic disruption to their normal business practices has resulted in a loss of referrals to our programs. We also have three programs that exclusively work with high school students and these programs have seen drastic reductions in the number of participating students and one has not yet returned altogether. However, the pandemic also provided us with an opportunity to partner with the Tennessee Department of Labor & Workforce Development on the Tennessee Reemployment Project, which was designed to assist individuals whose employment was impacted by COVID to gain new skills and reenter the workforce."

6. Contact Tracing: With schools open, students can be exposed to COVID (or even at home) and become contact traced. This is a two week quarantine for the student. Parents that do not receive pay when they are off from work because of this quarantine suffer financially and get behind in their bill payments.

7. New legislation or other sources that have changed for the families since the CA was completed are:

a. Legislation changed to provide families on the EBT program an increase in the Supplemental Nutrition Assistance Program.

b. Legislation changed to provide two stimulus payments to American families. March 2020 and January 2021.

c. Free medical services will be offered in the Lake City community in February 2021 when the Free Medical Clinic opens. This is a community with a great need for these services.

d. Educational services are now offered virtually to the children when it becomes necessary to close the classroom, school, or district or if a parent decides that full time virtual learning is the best choice.

e. Family services and trainings are offered virtually since March 2020 and continue through the 2020-2021 school year. Parent trainings are also offered virtually.

8. Transportation Services: There are no changes in transportation services to the low-income families in the community.

9. Impact on Nutritional Services and Food Insecurities:

a. Churches have increased their food pantry services.

b. School districts have increased their food distribution to families.

c. The program continues to provide students with second harvest distribution weekly on Fridays.

d. During the 2020 portion of the pandemic, food was distributed to the families via drive through services held at the schools. Families that had no transportation and couldn't get to the elementary schools to pick up food had the food delivered by family service and other program staff.

e. Currently (2020-2021) meals are distributed to children participating in virtual services via drive through services.

f. Meals are provided through the Food for Kids Program or School Nutritional Services. Children take home meals on a weekly basis.

g. The school's nutrition program, for the 2019-2020 program, provided families with children 18 and younger with packed lunches during the shut-down of school at assigned school locations with assigned days and times. The preschool program delivered packed lunches to enrolled families in need with limited transportation.

h. Family service staff referred families to the WIC program at the AC Health Department so that families could receive a WIC card to purchase the approved items at the grocery store.

10. Individual Supplies: Children must now have individual supplies to use in the classroom. This has caused a shortage nationwide in securing the supplies since this is a CDC guideline and there is high demand. At first securing cleaning and sanitizing were in short supply. Although still in short supply at times for the most part these are now available. Sanitizer machines have been purchased for each classroom to use.

11. Teaching and Learning Virtually: Teaching staff have implemented curriculum lessons both through in-person lessons and to students who attend virtually due to the COVID-19 pandemic. Virtual lessons are provided to Head Start children and families via Google Classroom and include the components of the curriculum that are being implemented in the classroom each day. Early Head Start children and families receive lessons through the Teaching Strategies GOLD Family Platform. Educational supplies to support at-home learning are provided to the families of virtual students and include materials to support the development of age appropriate school readiness skills.

Delegate: The Creative Curriculum is implemented either in-person or through a virtual model. Parents receive the virtual lessons through See Saw. This includes a lesson plan with suggested activities as well as instructional videos to support them. Education supplies to support at-home learning are provided to the families of virtual students and include materials to support the development of age appropriate school readiness skills.

#### 12. Support for Staff Health and Wellness:

a. Staff members and children are provided masks, thermometers, hand sanitizer, shields, hand lotion, and gowns as needed for their safety. Special activities and incentives are offered each month.

Delegate: Staff members are provided masks, thermometers, hand sanitizer, and shields for their safety.

b. The program has provided training and resources to support staff health and wellness. This includes access to a counselor, a quarterly "Mindful Moment" newsletter created by a nutritionist, and training opportunities to practice self-help or wellness exercises.

#### 13. Health and Mental Health Services:

a. The pandemic has caused an increase in the request for mental health support. Support has been provided both in-person and through virtual means to parents through community partners. Numerous agencies have provided helplines to support families needing immediate support due to the pandemic. The program has maintained a strong partnership with Ridgeview Mental Health Center and Helen Ross McNabb to support our students and families with any mental health need.

4. Health and Safety information is provided virtually to parents through READY ROSIE, REMIND, See Saw, virtual training and monthly newsletters.

#### 15. The pandemic impact for Family Services:

a. The pandemic has had significant impacts on family services. The first impact was having to reduce in-person interactions such as face to face and home visits to follow safety protocol to properly maintain social distance for staff and families. These reductions have caused decreases in reports of child abuse and neglect. While domestic violence, substance misuse, and mental health challenges have become on the rise in a family's home. With families spending more time at home due to the pandemic, there have become fewer opportunities for family service staff and teachers to identify families at risk and needs.

b. Family service staff make contact with parents by ZOOM meetings held electronically. In rare circumstances we may conduct in-person contact with families following the safety protocols for social distancing.

c. Due to the closure of school due to the pandemic, family services participated in modified recruitment events such as: kindergarten round up, childfind, resource fairs, etc. during the spring of 2020. These type of events allowed family service staff to network with eligible families and build a relationship at the beginning of the application process.

d. The program switched to a virtual platform (school's social media page) to increase recruitment strategies for the program. The program encouraged families enrolled in the program and staff to participate in recruitment activities to boost the program recruitment process to get income eligible children enrolled for the 2020-2021 program year.

Delegate: The Delegate utilized various strategies to recruit students. These strategies included social media, encouraging enrolled families to promote the program, and providing flyers to the school system's schools for distribution as well as providing flyers for community partners for distribution.

e. Families in need of food supplies, housing assistance, mental health needs, job loss, etc. has increased. We collaborate with community agencies to meet these needs.

f. Family services has continued to assist families and make contact to enroll families weekly. The family service staff has continued to build community outreach during this time to stay up-to-date on new resources and information available for individuals and families in the community.

g. Family services has continued to make referrals to community organizations for families where needs have been expressed or identified. Family services has continued to follow through with families that have been referred to make sure that their needs have been met.

h. Family service staff have continued to stay in contact and collaborate with community agencies and partners through virtual platforms to build stronger relationships in working together when providing assistance with a shared family.

i. Family service staff provide families with up-to-date resource information of needs through social media, monthly newsletters, emails, Remind, See Saw, phone calls, etc.

j. Due to the pandemic, parent participation has declined. This is caused by parent only having virtual access to workshops, parent meetings, virtual events, and volunteering in the classroom. For lack of participation, family service staff collaborates ideas to get input from families enrolled to better improve the family engagement piece through a virtual platform (zoom, remind app, social media, etc.)

Delegate: The pandemic has created difficulty for in-person parent engagement. The use of See Saw program-wide has been beneficial for consistent communication with families. A primary source of engagement with families has been to include families as a partner in the curriculum. Parents have participated virtually with their child's classroom, many of whom have been seen as "experts" for various studies taking place.

k. Volunteers and community members donated Blessing Boxes to the schools in the community to better meet the needs of individuals and families in the community. The program works with community partners to keep the blessing box stocked when possible.

l. Families received an increase in food stamps for enrolled in public schools and having to stay at home during CVOID. Families were alerted to this through the social media and newsletters.

m. The program referred families in need of food to multiple food pantries and churches. 41% of families enrolled in the program for the 2019-2020 school year were referred for food.

n. The program also works with the contracted nutrition coach to provide easy healthy and cheap recipes on a budget to families to make at home during the pandemic to learn better ways to eat healthy and budget. The nutrition coach provided nutrition newsletters and videos on recipes to make at home through the remind app, preschool newsletter, and schools social media page.

16. Health: The most urgent issues for health in our community are the healthcare needs of all citizens impacted by COVID 19 pandemic. Health departments struggle to meet the high demand of individuals needing tested. Testing sites and times available are not long enough to get all requesting testing



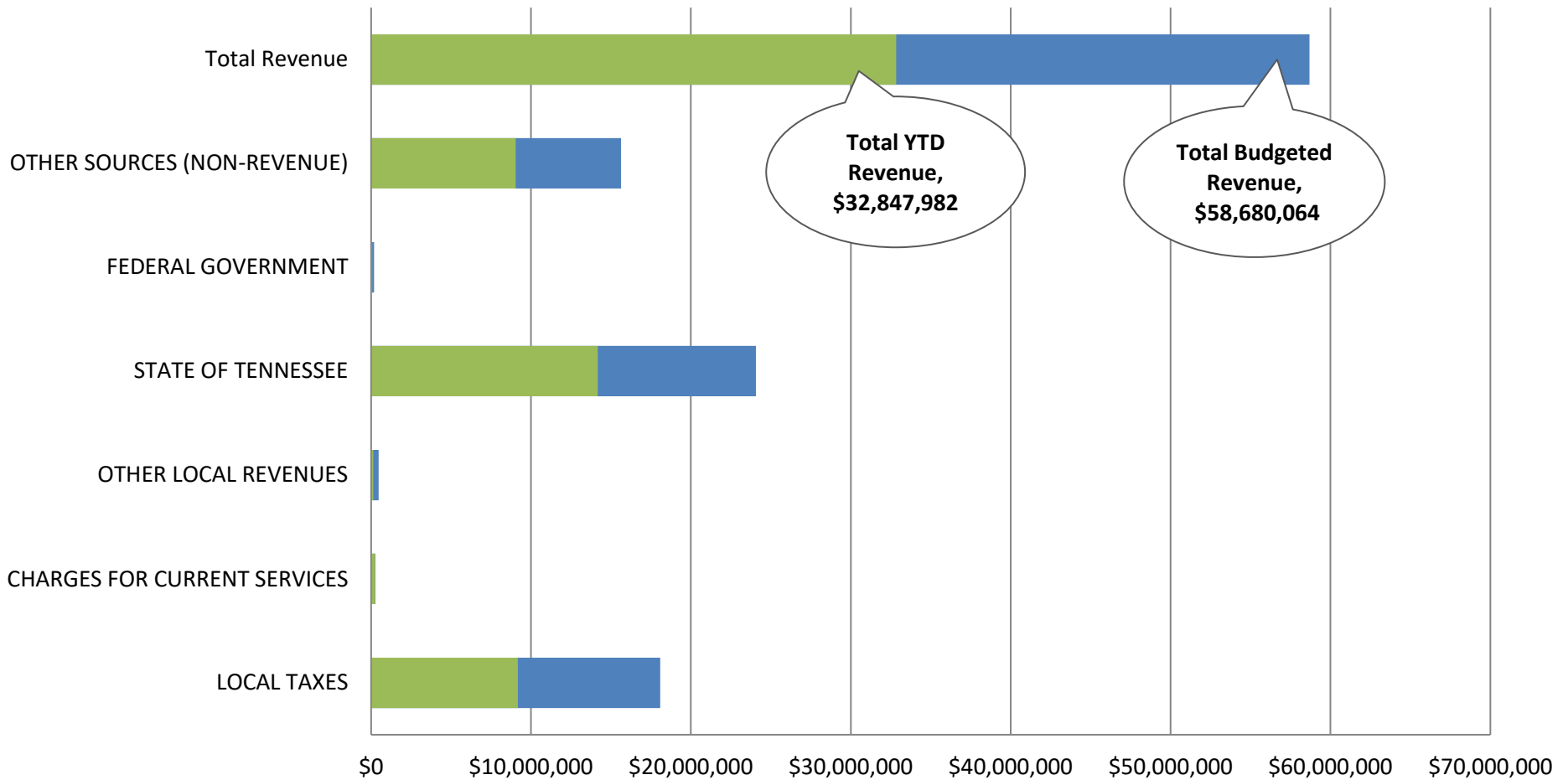
Acct	Acct	2020-21 FYTD Budget	January 2020-21 Monthly Activity	2020-21 Year-To-Date	2020-21 Percent of Budget	2020-21 Variance from Bud	2020-21 Encumbered Amount	Unencumbered Budget Remaining
40110	Current Property Tax	11,711,350.00	3,473,936.28	5,364,337.85	45.80%	6,347,012.15		6,347,012.15
40210	Local Option Sales Tax	6,366,339.00	643,899.19	3,812,046.12	59.88%	2,554,292.88		2,554,292.88
40275	Mixed Drink Tax	125.00	6.25	174.31	139.45%	-49.31		-49.31
40280	Mineral Severance Tax	125.00		5.30	4.24%	119.70		119.70
43511	Tuition - Regular Day Students	245,000.00	40,385.74	254,320.65	103.80%	-9,320.65		-9,320.65
43513	Tuition - Summer School	12,000.00		150.00	1.25%	11,850.00		11,850.00
43533	Transportation Fees	5,000.00		70.00	1.40%	4,930.00		4,930.00
44110	Interest Earned	140,000.00	1,564.63	12,302.79	8.79%	127,697.21		127,697.21
44120	Lease/Rentals	18,000.00		205.00	1.14%	17,795.00		17,795.00
44170	Miscellaneous Refunds	2,500.00		4,739.22	189.57%	-2,239.22		-2,239.22
44530	Sale of Equipment	35,000.00	15,292.10	27,063.30	77.32%	7,936.70		7,936.70
44570	Contributions & Gifts	195,553.00		81,589.00	41.72%	113,964.00		113,964.00
44990	Other Local Revenues	75,000.00	338.00	2,128.50	2.84%	72,871.50		72,871.50
46511	Basic Education Program	23,331,000.00	2,323,700.00	13,876,200.00	59.48%	9,454,800.00		9,454,800.00
46515	Early Childhood Education	460,110.64	39,022.42	186,728.56	40.58%	273,382.08		273,382.08
46590	Other State Education Funds	75,000.00	11,986.05	37,055.28	49.41%	37,944.72		37,944.72
46610	Career Ladder Program	133,500.00		64,081.94	48.00%	69,418.06		69,418.06
46980	Other State Grants	24,590.68				24,590.68		24,590.68
46990	Other State Revenues	45,189.00		9,250.50	20.47%	35,938.50		35,938.50
47143	Special Education Grants	50,000.00				50,000.00		50,000.00
47630	Public Law 874 - Maint/Operat.	55,000.00	31,268.00	63,300.00	115.09%	-8,300.00		-8,300.00
47640	ROTC Reimbursement	73,772.00		7,401.82	10.03%	66,370.18		66,370.18
49700	Insurance Recovery	6,947.00		5,761.00	82.93%	1,186.00		1,186.00
49800	Transfers In	125,000.00		926.02	0.74%	124,073.98		124,073.98
49810	City General Fund Transfer	15,493,963.00	1,291,163.58	9,038,145.06	58.33%	6,455,817.94		6,455,817.94
-----	Revenue	58,680,064.32	7,872,562.24	32,847,982.22	55.98%	25,832,082.10		25,832,082.10
		=====	=====	=====	=====	=====		=====
71100	Regular Instruction Prgm	27,243,822.47	2,164,330.05	13,791,672.74	50.62%	13,452,149.73	12,757,876.68	694,273.05
71150	Alternative Instruction Prgm	821,539.00	68,140.56	408,888.58	49.77%	412,650.42	387,365.33	25,285.09
71200	Special Education Prgm	4,472,243.53	362,092.50	2,181,705.77	48.78%	2,290,537.76	2,073,715.65	216,822.11
71300	Career/Technical Education Prg	1,443,463.36	124,289.29	708,477.77	49.08%	734,985.59	692,015.76	42,969.83
71900	Contingency	1,634,125.56				1,634,125.56		1,634,125.56
72120	Health Services	603,072.00	53,143.78	320,460.68	53.14%	282,611.32	265,818.36	16,792.96
72130	Other Student Support	1,708,637.00	129,323.29	957,972.25	56.07%	750,664.75	633,900.42	116,764.33
72210	Regular Inst. Support	3,307,643.00	216,000.41	1,422,675.79	43.01%	1,884,967.21	1,558,859.76	326,107.45
72220	Special Education Support	833,023.00	66,084.54	450,173.55	54.04%	382,849.45	360,716.64	22,132.81
72230	Career & Technical Prg Support	116,455.00	9,163.27	68,613.72	58.92%	47,841.28	40,076.17	7,765.11
72250	Technology Services	2,559,100.31	193,421.49	1,486,275.35	58.08%	1,072,824.96	836,211.34	236,613.62

Acct	Acct	2020-21 FYTD Budget	January 2020-21 Monthly Activity	2020-21 Year-To-Date	2020-21 Percent of Budget	2020-21 Variance from Bud	2020-21 Encumbered Amount	Unencumbered Budget Remaining
72290	Communications	118,835.88	11,480.75	67,836.43	57.08%	50,999.45	39,953.32	11,046.13
72310	Board of Education	1,109,590.69	81,971.08	705,139.39	63.55%	404,451.30	5,783.73	398,667.57
72320	Director of Schools	356,921.00	28,961.24	205,924.18	57.69%	150,996.82	139,732.62	11,264.20
72410	Office of the Principal	3,865,698.53	324,778.62	2,167,545.90	56.07%	1,698,152.63	1,639,690.37	58,462.26
72510	Fiscal Services	852,180.00	65,536.65	492,226.19	57.76%	359,953.81	315,892.20	44,061.61
72520	Human Resources/ Personnel	414,448.00	38,290.48	250,781.24	60.51%	163,666.76	145,414.68	18,252.08
72610	Operation of Plant	4,450,309.91	349,076.96	2,411,007.85	54.18%	2,039,302.06	974,242.74	1,065,059.32
72620	Maintenance of Plant	1,681,534.99	122,206.74	974,064.28	57.93%	707,470.71	577,193.36	130,277.35
72710	Transportation	1,562,142.00	109,236.13	727,653.80	46.58%	834,488.20		834,488.20
73400	Early Childhood Education	460,110.64	39,190.94	225,919.50	49.10%	234,191.14	227,405.07	6,786.07
73401	Pre-K General Fund	676,871.45	62,267.24	362,258.80	53.52%	314,612.65	219,876.82	94,735.83
76100	Regular Capital Outlay	577,205.00	29,176.07	73,348.93	12.71%	503,856.07	149,303.07	354,553.00
99100	Transfers Out	83,179.00				83,179.00		83,179.00
-----	Expense	60,952,151.32	4,648,162.08	30,460,622.69	49.97%	30,491,528.63	24,041,044.09	6,450,484.54
-----	General Purpose School Fund	-2,272,087.00	3,224,400.16	2,387,359.53	52.92%	-4,659,446.53	-24,041,044.09	19,381,597.56
Grand Revenue Totals		58,680,064.32	7,872,562.24	32,847,982.22	55.98%	25,832,082.10		25,832,082.10
Grand Expense Totals		60,952,151.32	4,648,162.08	30,460,622.69	49.97%	30,491,528.63	24,041,044.09	6,450,484.54
Grand Totals		2,272,087.00	3,224,400.16	2,387,359.53	-105.07%	4,659,446.53	24,041,044.09	19,381,597.56
		Loss	Profit	Profit		Loss	Loss	Profit

Number of Accounts: 1228

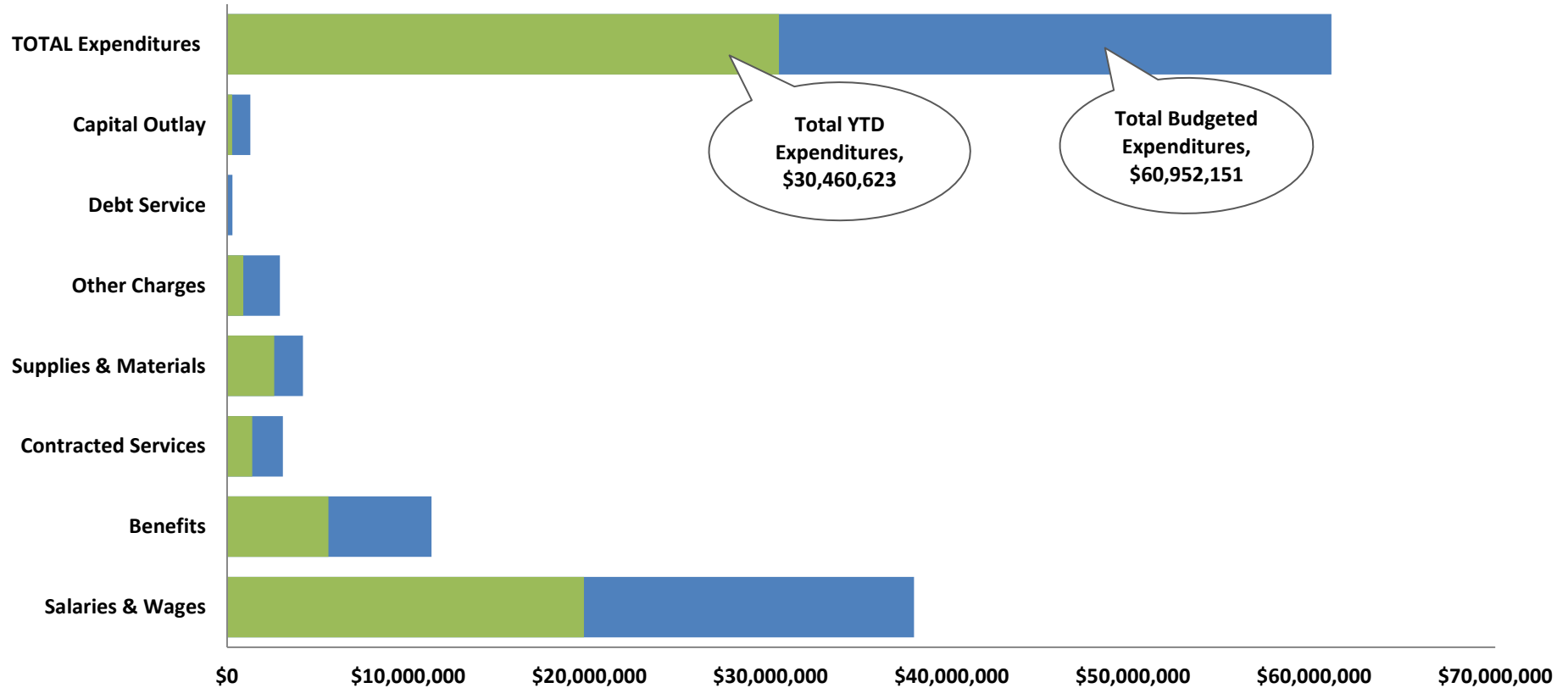
\*\*\*\*\* End of report \*\*\*\*\*

## General Fund Revenue Budget to Actual Summary - January, 2021



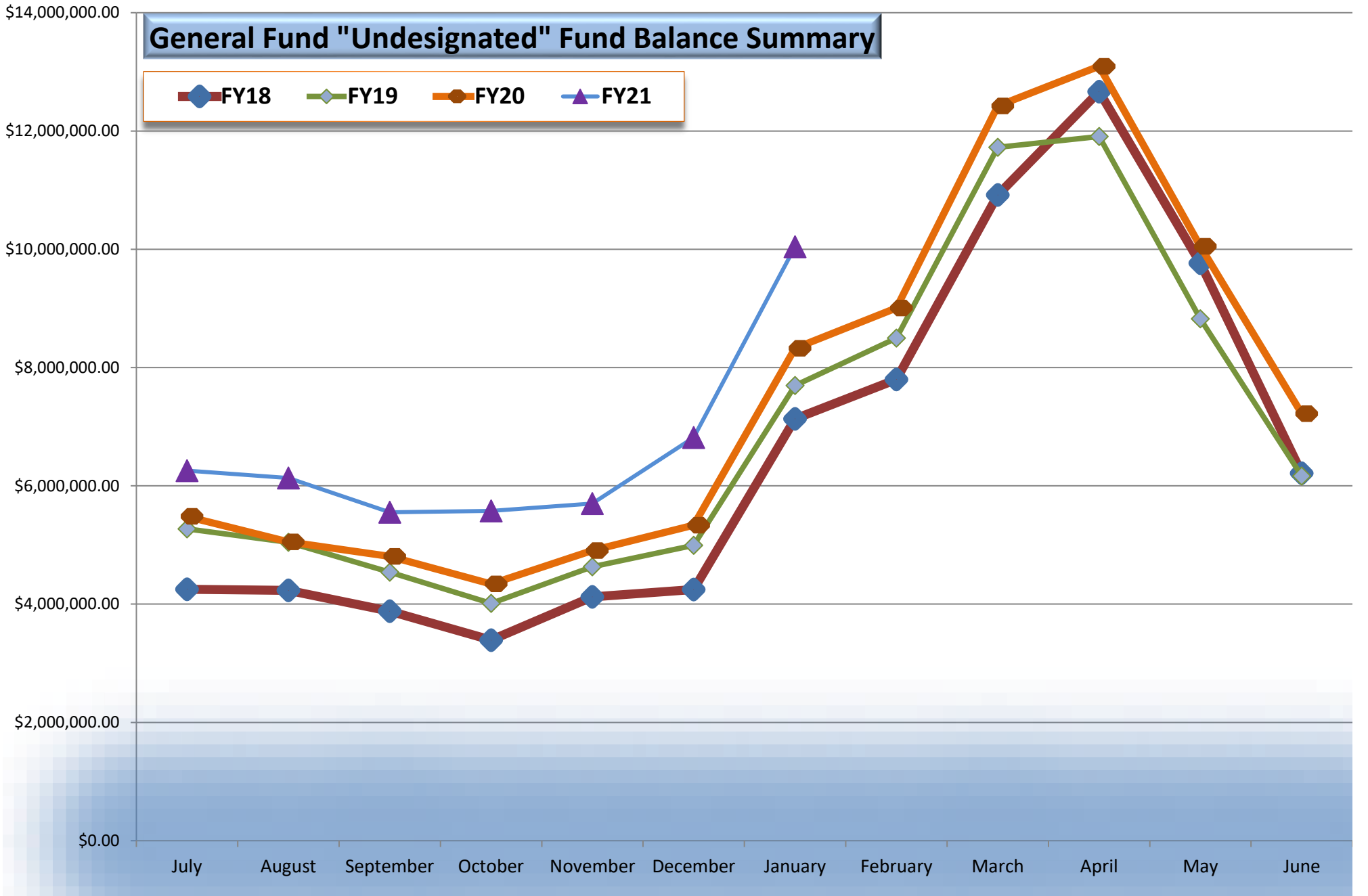
	LOCAL TAXES	CHARGES FOR CURRENT SERVICES	OTHER LOCAL REVENUES	STATE OF TENNESSEE	FEDERAL GOVERNMENT	OTHER SOURCES (NON-REVENUE)	Total Revenue
■ Percent of Budget	50.76%	97.15%	27.47%	58.89%	39.55%	57.88%	55.98%
■ Year-To-Date	9,176,563.58	254,540.65	128,027.81	14,173,316.28	70,701.82	9,044,832.08	\$32,847,982
■ FYTD Budget	18,077,939.00	262,000.00	466,053.00	24,069,390.32	178,772.00	15,625,910.00	\$58,680,064

## General Fund Expenditure Budget to Actual Summary by Object January, 2021



	Salaries & Wages	Benefits	Contracted Services	Supplies & Materials	Other Charges	Debt Service	Capital Outlay	TOTAL Expenditures
<b>FYTD %</b>	51.95%	49.56%	45.89%	61.33%	30.89%	0	22.01%	49.97%
<b>FYTD Activity</b>	19,699,436.03	5,592,392.11	1,392,406.74	2,594,804.32	899,889.34	0	281,694.15	\$30,460,623
<b>FYTD Revised Bdg</b>	37,922,583.11	11,283,918.61	3,079,139.29	4,186,781.73	2,913,667.86	287,205.00	1,278,855.72	\$60,952,151

# General Fund "Undesignated" Fund Balance Summary



Acct	Acct	2020-21 FYTD Budget	January 2020-21 Monthly Activity	2020-21 Year-To-Date	2020-21 Percent of Budget	2020-21 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
142	School Federal Projects							
R	Revenue							
47131	Vocational Program Improvement	124,801.54	7,811.76	73,986.65	59.28%	50,814.89		50,814.89
47139	Other Vocational	150,000.00	4,606.47	132,927.93	88.62%	17,072.07		17,072.07
47141	Title I	1,013,484.09	65,260.35	428,128.16	42.24%	585,355.93		585,355.93
47143	Special Education Grants	1,166,454.62	88,148.60	435,190.14	37.31%	731,264.48		731,264.48
47145	Special Ed Pre-School Grants	44,904.87	2,544.02	12,716.98	28.32%	32,187.89		32,187.89
47146	English Lang Acq Grants	28,088.51		5,332.11	18.98%	22,756.40		22,756.40
47147	Title IV Part B, 21st Century	166,148.98	12,490.81	53,430.38	32.16%	112,718.60		112,718.60
47189	Title II	168,560.54	29,558.72	69,201.26	41.05%	99,359.28		99,359.28
47301	ESSER	756,515.31		541,709.83	71.61%	214,805.48		214,805.48
47303	COVID19 Grant	100,000.00		100,000.00	100.00%			
47304	Remote Technology Grant	90,940.35		90,940.35	100.00%			
47305	Internet Connectivity Grant	45,000.00		41,084.83	91.30%	3,915.17		3,915.17
47590	Other Federal Through State	84,728.55	2,101.74	17,644.29	20.82%	67,084.26		67,084.26
47990	Other Direct Fedral Revenue	1,058,373.94	80,923.03	399,438.09	37.74%	658,935.85		658,935.85
-----	Revenue	4,998,001.30	293,445.50	2,401,731.00	48.05%	2,596,270.30		2,596,270.30
E	Expense							
71100	Regular Instruction Prgm	1,682,428.75	83,282.61	1,094,148.90	65.03%	588,279.85	330,062.61	258,217.24
71200	Special Education Prgm	904,953.46	62,379.10	394,468.11	43.59%	510,485.35	336,075.89	174,409.46
71300	Career/Technical Education Prg	257,781.54	22,564.45	226,747.44	87.96%	31,034.10	10,847.92	20,186.18
72120	Health Services	16,946.00	1,311.23	7,852.39	46.34%	9,093.61	6,556.11	2,537.50
72130	Other Student Support	95,893.74	9,690.52	39,188.04	40.87%	56,705.70	23,335.67	33,370.03
72210	Regular Inst. Support	411,494.84	16,290.05	202,914.52	49.31%	208,580.32	91,175.69	117,404.63
72220	Special Education Support	252,827.48	25,658.81	147,745.45	58.44%	105,082.03	132,012.30	-26,930.27
72230	Career & Technical Prg Support	2,600.00				2,600.00		2,600.00
72250	Technology Services	9,990.24		202.98	2.03%	9,787.26		9,787.26
72610	Operation of Plant	20,533.00		3,915.44	19.07%	16,617.56	8.99	16,608.57
73300	Community Services	1,207,500.42	84,312.60	545,412.56	45.17%	662,087.86	391,404.71	270,683.15
99100	Transfers Out	135,051.83		926.02	0.69%	134,125.81		134,125.81
-----	Expense	4,998,001.30	305,489.37	2,663,521.85	53.29%	2,334,479.45	1,321,479.89	1,012,999.56
-----	School Federal Projects		-12,043.87	-261,790.85	50.67%	261,790.85	-1,321,479.89	1,583,270.74

Acct	Acct	2020-21 FYTD Budget	January 2020-21 Monthly Activity	2020-21 Year-To-Date	2020-21 Percent of Budget	2020-21 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
142	School Federal Projects							
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143	Central Cafeteria							
R	Revenue							
43521	Lunch Payments - Children	237,298.00		11,131.95	4.69%	226,166.05		226,166.05
43522	Lunch Payments - Adults	4,000.00	23.70	319.95	8.00%	3,680.05		3,680.05
43523	Income From Breakfast	28,866.00		1,758.60	6.09%	27,107.40		27,107.40
43525	A la Carte Sales	332,340.00	1,596.00	7,201.10	2.17%	325,138.90		325,138.90
43990	Other Charges for Food Service	10,000.00	3,561.10	14,083.05	140.83%	-4,083.05		-4,083.05
44110	Interest Earned	3,800.00	152.26	868.81	22.86%	2,931.19		2,931.19
46520	School Food Service	17,069.00				17,069.00		17,069.00
47111	USDA School Lunch Program	1,030,734.00	82,645.20	368,402.90	35.74%	662,331.10		662,331.10
47112	USDA Commodities	138,470.00				138,470.00		138,470.00
47113	Breakfast	360,119.00	40,551.18	178,551.26	49.58%	181,567.74		181,567.74
47114	USDA - Other	166,195.00	4,832.34	112,511.19	67.70%	53,683.81		53,683.81
-----	Revenue	2,328,891.00	133,361.78	694,828.81	29.84%	1,634,062.19		1,634,062.19
E	Expense							
73100	Food Service	2,508,891.00	4,434.16	680,757.47	27.13%	1,828,133.53	49,727.04	1,778,406.49
-----	Expense	2,508,891.00	4,434.16	680,757.47	27.13%	1,828,133.53	49,727.04	1,778,406.49
-----	Central Cafeteria	-180,000.00	128,927.62	14,071.34	28.43%	-194,071.34	-49,727.04	-144,344.30
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Acct	Acct	2020-21 FYTD Budget	January 2020-21 Monthly Activity	2020-21 Year-To-Date	2020-21 Percent of Budget	2020-21 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
145	Other Education Funds							
R	Revenue							
44990	Other Local Revenues	32,929.00	1,730.00	34,885.00	105.94%	-1,956.00		-1,956.00
46590	Other State Education Funds	123,041.38		106,796.68	86.80%	16,244.70		16,244.70
49800	Transfers In	83,179.00				83,179.00		83,179.00
-----	Revenue	239,149.38	1,730.00	141,681.68	59.24%	97,467.70		97,467.70
E	Expense							
72130	Other Student Support	112,790.65	8,437.05	54,421.53	48.25%	58,369.12	45,341.90	13,027.22
72210	Regular Inst. Support	2,500.00				2,500.00		2,500.00
72620	Maintenance of Plant	90,929.73		80,891.18	88.96%	10,038.55		10,038.55
73300	Community Services	32,929.00	2,069.51	25,462.01	77.32%	7,466.99	952.22	6,514.77
-----	Expense	239,149.38	10,506.56	160,774.72	67.23%	78,374.66	46,294.12	32,080.54
-----	Other Education Funds		-8,776.56	-19,093.04	63.24%	19,093.04	-46,294.12	65,387.16
			=====	=====	=====	=====	=====	=====
146	Extended School Program							
R	Revenue							
43581	Community Services Fees Child	456,651.00	31,507.60	170,049.60	37.24%	286,601.40		286,601.40
-----	Revenue	456,651.00	31,507.60	170,049.60	37.24%	286,601.40		286,601.40
E	Expense							
73300	Community Services	446,651.00	23,606.03	159,054.08	35.61%	287,596.92	100,275.69	187,321.23
99100	Transfers Out	10,000.00				10,000.00		10,000.00
-----	Expense	456,651.00	23,606.03	159,054.08	34.83%	297,596.92	100,275.69	197,321.23

Acct	Acct	2020-21 FYTD Budget	January 2020-21 Monthly Activity	2020-21 Year-To-Date	2020-21 Percent of Budget	2020-21 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
146	Extended School Program							
-								
-----	Extended School Program		7,901.57	10,995.52	36.03%	-10,995.52	-100,275.69	89,280.17
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Grand Revenue Totals	8,022,692.68	460,044.88	3,408,291.09	42.48%	4,614,401.59		4,614,401.59
Grand Expense Totals	8,202,692.68	344,036.12	3,664,108.12	44.67%	4,538,584.56	1,517,776.74	3,020,807.82
Grand Totals	180,000.00	116,008.76	255,817.03	142.12%	75,817.03	1,517,776.74	1,593,593.77
	Loss	Profit	Loss		Profit	Loss	Profit

Number of Accounts: 438

\*\*\*\*\* End of report \*\*\*\*\*

## Combined Fund Balance and YTD Operating Statement Summary

**January, 2021**

Description	General Fund 141	Federal Fund 142	Food Service Fund 143	Special Fund 145	ECC Fund 146
<b>Beginning Fund Balance July 1, 2020</b>	10,022,093.25	0.00	953,368.79	7,783.83	75,957.36
Plus YTD Revenue per books 1/31/21	32,847,982.22	2,401,731.00	694,828.81	141,681.68	170,049.60
Less YTD Expenditures per books 1/31/21	(30,460,622.69)	(2,663,521.85)	(680,757.47)	(160,774.72)	(159,054.08)
<b>Revenues Over (Under) Expenditures as of 1/31/21</b>	<b>2,387,359.53</b>	<b>(261,790.85)</b>	<b>14,071.34</b>	<b>(19,093.04)</b>	<b>10,995.52</b>
<b>Ending Fund Balance per books as of 1/31/21</b>	<b>12,409,452.78</b>	<b>(261,790.85)</b>	<b>\$967,440.13</b>	<b>(11,309.21)</b>	<b>86,952.88</b>

### Fund Balance Restricted/Committed/Assigned Status

Encumbrances and Deferred Revenue		\$ -	\$ 38,199.71		
Inventory					
Restricted for Career Ladder Program	-5,078.96				
Restricted for Operation of Non-Instructional Services			749,240.42		86,952.88
Committed for Other Purposes (Vehicles- ERR Fund)	283,570.52				
Assigned for Instruction- Coordinated School Health	2,533.96				
Assigned for other local grants					
Assigned for Instruction - Education Foundation Grant	769.56				
Assigned for Instruction (APSI-ORHS)	12,279.95				
Assigned for Support Services FRC Local Funds (56)				17,206.82	
Nonspendable-Prepaid Expenditures					
Assigned to Balance FY21 Budget	2,072,087.00	0.00	180,000.00		
<b>Unassigned Fund Balance 1/31/21</b>	<b>\$ 10,043,290.75</b>	<b>-261,790.85</b>		<b>-28,516.03</b>	
<b>Total Fund Balance 1/31/21</b>	<b>12,409,452.78</b>	<b>\$ (261,790.85)</b>	<b>\$ 967,440.13</b>	<b>(\$11,309.21)</b>	<b>\$ 86,952.88</b>