

Regular Board of Education Meeting

February 27, 2023 5:00 PM

Robert J. Smallridge School Administration Building

I. Call to Order

II. Pledge of Allegiance

III. Approval of Agenda

IV. Special Reports/Presentations

A. Good News

V. Public Forum

VI. Consent Agenda

A. Board Minutes: 1-23-23

VII. Items for Action

A. Resolution in Support of the Addition of the Scarboro 85 History Inclusion in the Current Revision of the Tennessee Social Studies Standards

B. FY23 Tenure Status for Eligible Staff Members

C. Addition of 1.0 Math Teacher/Head Football Coach at Oak Ridge High School

D. FY24 Preschool Head Start and VPK Selection Criteria

E. FY24 Preschool Head Start Training and Technical Assistance Plan

F. FY24 Preschool Head Start Continuation Grant

G. Board Policy 1.106 Code of Ethics - First and Second Reading

H. Board Policy 1.107 Board Member Conflict of Interest - First and Second Reading

I. Purchase of Welding Lab Equipment

J. Purchase of Network Refresh

K. Copier Lease and Service Agreement

VIII. Items for Information

A. Enrollment and Attendance Reports

B. Financial Report

IX. Items for Discussion

X. Old Business

XI. New Business

XII. Communications

XIII. Adjournment



Linden Elementary School

We'd like to congratulate Brady Saltzman, a fourth-grade student, for qualifying at the Regional Geography Bee. He utilized his own time to study and test into the program. Way to go, Brady!

Linden Elementary is excited to announce they've been nominated for the 2023 National Blue Ribbon Schools Program. This could not have happened without the hard work of the staff and students, it's truly an honor!

Robertsville Middle School

Congratulations to 7th grader, Quentin Delmau, the 2023 RMS Spelling Bee Champion. Quentin won in the 11th round and retains his title from last year.

RMS TSA students did an amazing job at the 2023 TSA Regional Competition! The students placed either first, second or third in every event that we entered. This is a testament to their hard work and dedication.

Two RMS students had their entries accepted in the annual Dogwood Arts "Synergy Student Art Exhibition." This is a juried show, where teachers are allowed to enter 2 pieces and the judges decide which will be accepted into the exhibition. The 2 students are a 5th grader for their piece entitled, "Self-Portrait time Machine" and a 7th grader for their drawing "Study of Hands." A closing Reception and Awards Ceremony will be held at the Clayton Center for the Art on Thursday, March 23rd from 5:30pm-7:30pm.

Jefferson Middle School

The pronouncer and judges of the JMS Spelling Bee indicated it was obvious many students studied this year. There was a great showing that went 20 rounds! Congratulations to our winners: eighth-grader, Halie Campbell placed 3rd, Duncan Rowden, also an eighth-grader placed 2nd, while Ian Smith, a sixth-grader took home 1st place. Ian also qualified for the Tennessee Titans Regionals Spelling Bee by taking a test. Last week we learned he finished in the top 50 and has qualified to compete in the final Spelling Bee on Saturday, March 4 at the COX Auditorium at UT in Knoxville! Way to "bee"!

Congratulations to the Jefferson Middle School's FIRST LEGO League teams. They competed during the East Tennessee State Championship at the beginning of the month and represented JMS very well. The Atomic Eagles won the 2nd place Robot Design Award. This award goes to the team that uses outstanding programming principles and solid engineering practices to develop robots that are mechanically sound, durable, efficient and highly capable of performing challenge missions.

The RadioActive Brix won the 1st place Core Values Award. The JMS Team earned this award for displaying extraordinary enthusiasm and spirit, showing they can accomplish more together as a team and always showing each other and other teams respect.

The JMS Master Builders won the 3rd place Championship Award. This award celebrates the team that embodies the FIRST LEGO League Challenge experience by fully embracing our Core Values, achieving excellence and innovation in Robot Performance, Robot Design and the Innovation Project.



Jefferson Middle School (continued)

With this award, they've earned a spot at either the Razorback Invitational in Arkansas or the WPI Annual FLL event, also known as the Waffle in Worchester, Massachusetts.

Willow Brook

Kindergarten and first graders attended their first field trip to see Hansel and Gretel at the Oak Ridge Playhouse. They enjoyed reading Hansel and Gretel in class and learning essential standards: character, setting, main events, and theme. We were able to compare/contrast the book we read in class to the performance. This was due to a grant from the Tennessee Arts Commission and a grant we received for \$3,000. Second, third and fourth grade also attended.

Two students will have their art in the Dogwood Arts Synergy Art show this year! Third grade student, Djani Ba and fourth grade student, Kyle Cassidy had their work chosen and will be professionally framed! Kudos to these young artists and art teacher, Sara Cochran!

On Wednesday, February 15, Willow Brook Elementary held their International STEM night. The STEM and International Club collaborated to provide Willow Brook families, staff and community members a night to create and enjoy each other's company and cultures. We had families come in traditional clothing and bring dishes to share from their countries. The night started with taste tasting foods from four continents. Protomet gave a presentation about their company, how they support the community and presented the campus with a plaque that will be proudly displayed in the lobby. Forty-four families explored and learned from staff and community member STEM booths. Six different community member booths and eight staff booths were represented over nine different countries. The Lu in the gym provided opportunities for parents and their children to compete in games. Thank you to our STEM Coaches, Michelle Chenot and Tiffany Collins and our International Club sponsors, Bill Meidl and Terry Gonzalez for their hard work!

2-27-2023

Keys Filhauer, Chairman

Oak Ridge Board of Education

Bruce Borchers, Superintendent, Oak Ridge Schools Administration

Andy Mckamey, Chair, Anderson County Board of Education

Dr. Tim Parrott, Director of Schools

Thanks for your ongoing support through resolutions honoring the Scarboro 85, however there needs to be a living legacy of the history through the TN social studies curriculum. Traditionally, a centerpiece of social studies is the understanding of American and Tennessee History. The second round of public feedback begins today – March 26, 2023. The Scarboro Community Alumni Association is asking the Oak Ridge and Anderson County Board of Education to support efforts that the Scarboro 85 story be incorporated in the Tennessee social study standards.

In January 1955, the Atomic Energy Commission announced that the Oak Ridge Tennessee Schools would integrate some 100 African American students to attend Robertsville Junior High and Oak Ridge High School.

The history of this special event has been incorporated in local proclamations; i.e., the Tennessee House of Representatives House Joint Resolution No 135, and the US Congressional Record 167(189), Proceedings and Debates of the 117th Congress, 1st Session. It is now equally important this history be incorporated within appropriate courses in Tennessee social studies standards. This would afford students in Tennessee to preserve the history and honor the courageous parents, teachers, students of the Scarboro 85 and the Atomic Energy Commission's amazing civil rights leadership in 1955.

We hope you will sign this resolution that the Scarboro 85 story be included in the current revision of the Tennessee Social Studies standards.

Sincerely,

Rose Weaver, Scarboro Community Alumni Association

Bruce Borchers, Superintendent Oak Ridge School

Keys Filhauer, Chairman Oak Ridge Board of Education

Chairman, Anderson County Board of Education

Director, Clinton Schools



FY23 Tenure Eligible

Amber Ashworth – Glenwood

Jonathan Purtill – Glenwood

Kolbi Sherrod – Glenwood

Tracey Sizemore – Glenwood

Dominique Nichols – Linden

Leslie Hagan – Woodland

Amy Jeske – Woodland

Nancy Mawhinney – Willow Brook

Amanda Seal – Willow Brook

Jaimie McMahon – Jefferson

Mary Kathleen Roop– Jefferson

Sean Rutherford – Jefferson

William Eli Manning– Robertsville

Elizabeth Reams - Robertsville

Heidi Foster - ORHS

Alison King - ORHS

James Mason- ORHS

Ryan Nichols - ORHS

Ashley Wagner - ORHS

James Branson - ORHS

Tony Jolly - SAB

Kevin Roberts – ORHS/LN

Kelley Thompson

Rationale for Recommendation to Hire ORHS Head Football Coach Derek Rang

I recommend approval of hiring Derek Rang as a Math Teacher and High School Head Football Coach at ORHS with a start date of March 1, 2023.

Coach Rang will be replacing Coach Scott Cummings following his resignation. It is essential that Coach Rang be hired on March 1, 2023 to allow him time to prepare for the Fall 2023 season, running Spring football practice, assisting with the Math Department (his area of certification), building relationships with staff, students and community.

This position will be funded for the remainder of FY23 by savings in the teacher line from mid-year retirements & resignations.



Oak Ridge Schools

PRESCHOOL

Rationale for Approval of Preschool Head Start and VPK Selection Criteria

2023-2024

The attached Selection Criteria were developed in collaboration with Anderson County Head Start and our preschool Policy Committee (parent group). These documents lay out the criteria with which we select/qualify students for our Head Start and Voluntary Pre-K programs. This also assists in creating a wait list prioritized by level of need for both programs.

Respectfully,

Lisa Downard

Mrs. Lisa M Downard

Principal

157 Carver Ave | Oak Ridge, TN 37830

lmdownard@ortn.edu | (865) 425-9101

www.ortn.edu

Every student prepared for college, career, and life success



Oak Ridge Schools

PRESCHOOL

Child's Name _____ Birth Date _____ Age _____

OAK RIDGE SCHOOLS' PRESCHOOL/HEAD START SELECTION CRITERIA

2023-2024

Children are eligible to apply for Oak Ridge Schools' Preschool if they reside in the city of Oak Ridge and if they are three and not yet five years of age before August 15th of the school year for which they are applying. Each applicant will be ranked on the following admission criteria and those with the highest number will be accepted for available program slots.

CATEGORY	CRITERIA	POINTS
Family Income Status	Income at or below Federal poverty level	100
	Categorically eligible: receive TANF, SSI, Families First, SNAP	100
	Foster family	100
	Homeless or Non-custodial Relative Care/Kinship Care	100
INCOME ELIGIBLE CHILDREN		
Disabilities	Diagnosed disability—(specify)	30
	TEIS	30
ADDITIONAL CRITERIA (other risk factors determined locally)		
Financial	Tenn Care Recipient	5
	No Insurance within household	10
	Receive WIC	3
	Head of household attending school—(specify)	4
	Head of household without high school diploma or GED	4
	Head of household employed	4
Family Status	Family crisis/stress during past year (COVID-19, death, illness, job loss, incarceration, documented child abuse, etc)	15
	Parent or sibling with a disability, mental health or medical issue	6
	Parent under 18 years old when child born—teen parent	6
	Parental concerns regarding development	3
	Concern from Child Find screening—(specify)	10
	Parent absent from home due to military service	5
	Single parent family	10
Applicant Status	Meets three year old age requirement by August 15 of school term	5
	Meets four year old age requirement by August 15 of school term	3
	Transitioning from Early Head Start	10
	Prenatal exposure to drugs or alcohol/parent substance misuse	10
	Health or behavioral concerns that may impact learning-(documented by dr.)	10
	Referral by other public or private agency—(specify)	10
	English Language Learner—(specify language spoken)	5
	No prior group experience	5
	Previous Head Start Family	5
	Previously in foster care or protective services	5
	Unserved student on waitlist for >1 year	5
	Older sibling currently enrolled	5
	OVER INCOME CHILDREN AND FAMILIES	
	Diagnosed disability or health impairment (over income only)—(specify)	50
	Suspected disability or health impairment (over income only)—(specify)	30
TOTAL POINTS		

Revised and approved by Head Start Policy Committee _____

Child's Name _____ Birth Date _____ Age _____

OAK RIDGE SCHOOLS' PRESCHOOL/PRE-K AND TITLE 1

2023-2024

Children are eligible to apply for Oak Ridge Schools' Preschool if they reside in the city of Oak Ridge and if they are three and not yet five years of age before August 15th of the school year for which they are applying. Each applicant will be ranked on the following admission criteria and those with the highest number will be accepted for available program slots.

CATEGORY	CRITERIA	POINTS
Family Income Status	Income at or below Federal poverty level	100
	Categorically eligible: receive TANF, SSI, Families First	100
	Foster family	100
	Homeless or Non-custodial Relative Care/Kinship Care	100
INCOME ELIGIBLE CHILDREN		
Disabilities	Diagnosed disability—(specify)	30
	TEIS	30
ADDITIONAL CRITERIA (other risk factors determined locally)		
Financial	Tenn Care Recipient	5
	No Insurance Within Household	10
	Receive WIC or SNAP	10
	Head of household attending school—(specify)	4
	Head of household without high school diploma or GED	4
	Head of household employed	4
Family Status	Non-parental custody—(specify)	10
	Family crisis/stress during past year (COVID-19, death, illness, job loss, incarceration, documented child abuse, etc)	15
	Parent or sibling with a disability, mental health or medical issue	6
	Parent under 18 years old when child born—teen parent	6
	Parental concerns regarding development	3
	Concern from Child Find screening—(specify)	10
	Parent absent from home due to military service	5
	Single parent family	10
Applicant Status	Meets three year old age requirement by August 15 of school term	3
	Meets four year old age requirement by August 15 of school term	5
	Prenatal exposure to drugs or alcohol/parent substance misuse	10
	Health or behavioral concerns that may impact learning-(documented by dr.)	10
	Referral by other public or private agency—(specify)	10
	English Language Learner—(specify language spoken)	10
	No prior group experience	5
	Previously in foster care or protective services	5
	Unserved student on waitlist for >1 year	5
	Previous VPK Family	5
	OVER INCOME CHILDREN AND FAMILIES	
	Diagnosed disability or health impairment (over income only)—(specify)	50
	Suspected disability or health impairment (over income only)—(specify)	30
	TOTAL POINTS	

Revised and approved by Pre-K Advisory Committee (CPAC) _____



Oak Ridge Schools

PRESCHOOL

Board of Education Approval

T/TA (Training & Technical Assistance) Grant

Preschool

2023-2024

I respectfully request approval of the T/TA Plan for 2023-2024. This plan lays out how \$8,846 of T/TA Head Start funds will be utilized for our program throughout the 2023-2024 school year. The items specified in the plan are based on results from the Community Assessment and Self-Assessment and support the Head Start Grant Broad Goals.

Respectfully,

Mrs. Lisa M Downard

Principal

157 Carver Ave | Oak Ridge, TN 37830

Imdownard@ortn.edu | (865) 425-9101

www.ortn.edu

Every student prepared for college, career, and life success



Oak Ridge Schools
PRESCHOOL

T/TA Plan 2023-2024
 Delegate: Oak Ridge Schools' Preschool/Head Start

T/TA Goal #1 -The Oak Ridge Preschool/Head Start program will provide training and support for staff and families to improve family engagement and strengthen overall wellbeing of the family.								
Expected Outcomes	Indicators	Documentation/Frequency of Measurement	T/TA Strategies Events/Activities	Resource	Target Audience or HS Mgt. System	Responsible Manager	Timeline	Estimated Cost
1) Staff and parents become more knowledgeable in ways to make parent trainings informative, yet fun and more appealing to parents * Resulting in stronger families with parents being more involved with their children	* Family services staff and teaching staff will receive training re: the incorporation of parent trainings into family events *Resulting in more participation in training activities	training sign-in sheets, agenda, family outcomes data	*Staff will receive training on the integration of parent training into family events and incorporating curriculum materials to do so	ECKLC, webinars, T/TA Network	FCS Manager, Family advocates Classroom Staff	Director and FCS Manager	SY 2023-2024	ECKLC Webinars or T/TA Network
2) Staff are more knowledgeable in providing support for families. Families become stronger as lifelong learners.	* Staff trained to assist parents with writing long term goals *Increase in family outcome scores	sign in sheets, training agenda, family surveys	*Provide family partnership training for family advocates to help them meet the requirements necessary to serve families.	ECKLC, webinars, T/TA Network, Community Partners, WKU, or other sources	Family Service Staff	FCS Manager	SY 2023-2024	Provided by T/TA Network or community partners
3) Staff more knowledgeable in how to provide support for males and their children *Resulting in stronger bonds between males and their children. *Increased male involvement with children's education	*More effective male involvement activities and an increase in male involvement	sign in sheets, agenda, training surveys, male volunteers documented in Child Plus	* Provide male involvement training for staff to learn ways to support fathers or significant males involved in the children's lives *Provide training for male family figures	ECKLC, webinars, T/TA Network, Community Partners	Parents, FCS Manager, Family advocates, teaching staff	Director and FCS Manager	SY 2023-2024	Provided by Program Staff
4) Staff more knowledgeable in best practices for supporting students using trauma informed instruction and support through "Conscious Discipline" *Improved mental health of students. *Improved behavior management in classrooms.	*Staff to utilize trauma informed teaching strategies as evidenced by use of "Conscious Discipline" *Teaching staff to learn best practices for children with challenging behavior *Families participate in Love and Logic Parenting Class to improve behavior management at home	training sign-in sheets, agenda	*Provide Conscious Discipline materials and training. *Provide Parenting with Love and Logic training for families	Conscious Discipline materials Love and Logic Facilitator	Teaching Staff; Parents	Education Coordinator	SY 2023-2024	\$2,000
5) Parents gain knowledge and understanding, becoming more comfortable volunteering within their child's classroom/school.	*Increased number of parents volunteering * Improved student outcomes	Sign-in sheets for training sessions Sign-in sheets for volunteers	*Training sessions/workshops provided for parents	Staff knowledge ECKLC	Families	FCS manager	SY 2023-2024	Provided by Program Staff
6) Decreased absenteeism/improved over-all student attendance	*Improved student attendance	Attendance reports-Child Plus	Information shared with local community--doctors' offices, social media	Family Resource Manager; ORS Family Resource Center	Community	FCS Manager	SY 2023-2024	\$250
Total to support Goal 1								\$2,250
T/TA Goal # 2: Oak Ridge Schools' Preschool/Head Start will strengthen educational services to improve the learning experiences for all students to enter Kindergarten with a solid foundation for academic success.								
Expected Outcomes	Indicators	Documentation/Frequency of Measurement	T/TA Strategies Events/Activities	Resource	Target Audience or HS Mgt. System	Responsible Manager	Timeline	Estimated Cost
1) Strengthen the school readiness framework by providing appropriate professional development in instruction during Professional Learning Communities (PLC)	* Staff attending PLCs *Increase in child outcomes scores *Training staff, parents, and board regarding the Early Learning Outcomes Framework and Developmentally Appropriate Practices	sign in sheets, agenda, Teaching Strategies Gold scores-3 checkpoints annually	*Continue established Professional Learning Communities (PLC) to provide on-going professional development training	PLC, program data, Early Learning Outcomes Framework, and TN Dept of Ed Resources	Teaching Staff	Education Coordinator	SY 2023-2024	Provided by Program Staff, ORS Staff, TN Dept of Ed
2) Implement curriculum with fidelity	*Increased student outcomes	Fidelity Tool, TSG data	*Curriculum training for teaching staff during monthly professional development opportunities *New teaching staff to Complete training modules on TSG	Education Coordinator, Curriculum Coach	Teaching Staff	Education Coordinator	SY 2023-2024	\$500

T/TA Plan 2023-2024
 Delegate: Oak Ridge Schools' Preschool/Head Start

3) Accurately assess student development with authentic, objective, and frequent documentation	*Increased student outcomes *Authentic and accurate data	sign-in sheets, training agenda, certificates of completion, Anecdotal records, Student Outcome data	*assessment training for staff inter-relater reliability *TSG	Education Coordinator, Curriculum Coach	Teaching Staff	Education Coordinator	SY 2023-2024	Provided by Program staff
4) Staff receive mental health training to manage their own mental health, as well as supporting the children and families' mental health	*Staff attend training *Increase in classroom mental health activities *Mentally healthy children and staff	sign in sheets, agenda, behavior/social skills screenings	* Provide mental health training in regards to stress reduction	Mental Health Consultant	All Staff	Education Coordinator	SY 2023-2024	\$500
5) Staff will gain knowledge about the Child Plus software system	*accurate tracking of Child Plus data	sign-in sheets, training agenda	* Provide Child Plus training as needed for all staff	Child Plus Consultant, program staff	All Staff	Education Coordinator, Compliance Manager	SY 2023-2024	\$1,500
6) Staff will increase understanding of classroom environment scales and implications for instruction.	*Increased student outcomes CLASS rating	*increased CLASS Scores , TSG Data, -as appropriate	*Provide CLASS training for all classroom staff	Director, Education Coordinator	Classroom Staff	Director, Education Coordinator	SY 2023-2024	Provided by program staff
Total to Support Goal 2								\$2,500

T/TA Plan 2023-2024
 Delegate: Oak Ridge Schools' Preschool/Head Start

T/TA Goal # 3: Oak Ridge Preschool/Head Start program will collaborate with families and work with community partners to support families' progress toward improved well being and financial stability.								
Expected Outcomes	Indicators	Documentation/Frequency of Measurement	T/TA Strategies Events/Activities	Resource	Target Audience or HS Mgt. System	Responsible Manager	Timeline	Estimated Cost
1)Managers will be well versed in the Head Start performance standards and Head Start requirements and will be equipped to meet the requirements and effectively monitor the program	* More effective ongoing monitoring *Program compliance *improved family well being *increased resources for families	Training certificates, agendas	*Attend HS trainings such as: Region IV Conference, State Conferences, THSA meetings/trainings, NHSA, Leadership Forums	T/TA Network, Regional HS Office, THSA, WKU	Director, Management Staff, Family Advocates, Teachers, Teaching Assistants	Director, Compliance Manager	SY 2023-2024	\$4,096
2) Governing Board and Policy Committee members will be more informed and knowledgeable of their roles and responsibilities.	*Members will be more confident in their role *Increased member input	sign in sheets, agendas,	*Provide governance training to Governing Body and Policy Committee members	Director	Governing Board and Policy Committee members	Director, Compliance Manager	SY 2023-2024	Provided by Program Staff
3) Staff will be knowledgeable of the data available and how to effectively input and access it	*Accurate program data * Accurate PIR	Training documentation, data collected	*Attend Child Plus User Group meetings and other Child Plus training opportunities *Staff training	Compliance Manager, Data Manager	Program managers, family advocates, classroom staff	Compliance Manager, Education Coordinator	SY 2023-2024	Paid from Base Grant
4) Develop a better understanding of the self-assessment and community assessment process, therefore performing a more thorough assessment of program operations and outcomes	* more in-depth, accurate self-assessment and data	training documentation, self-assessment documentation	* collaborate with grantee for training specific to self-assessment and data analysis	T/TA Network, program staff	Director, Compliance Manager, program managers	Compliance Manager	SY 2023-2024	Provided by Program Staff
5) Provide support for families to live healthier, active lives	*Staff and parents will receive nutrition training to help combat obesity in the program and community *Healthier staff and families *Encourage participation in "Power Up Peanuts" morning program	sign in sheets, agendas, growth assessments, surveys	*Provide nutrition training/classes for staff and parents *Provide training for staff regarding "Power Up Peanuts" or other similar program Partnership with "Grow Oak Ridge"-family training and community garden	UT Extension Office, company representatives	Parents and Staff	FCS Manager, Education Coordinator, Director	SY 2023-2024	Provided by Community Partners and other free resources
6) Parents will learn to create a budget and better manage their finances	*Families will become more in control of their financial situations * Families will be more self-sufficient	sign in sheets, agendas, family outcomes	* Provide financial training for families-group and individual	UT Extension Y-12 Credit Union program staff	Families	FCS Manager	SY 2023-2024	Provided by Community Partners
Total to support Goal 3								\$4,096

T/TA Plan 2023-2024
 Delegate: Oak Ridge Schools' Preschool/Head Start

Required Training	Resource	Target Audience	Expected Outcomes	Responsible Manager	Timeline	Estimated Cost		
Child CPR First Aid and Safety	State Certified Trainers, Oak Ridge Schools' system-wide nurse	Teaching Staff	Appropriate safety practices and first aid procedures followed in the event of an emergency situation	Health Manager	By existing expiration date and/or SY2023-2024	ORS District staff and certified trainer		
Additional Required Trainings: <ul style="list-style-type: none"> • Childhood emergencies • Health Policies • Childhood safety • Medication Administration procedures • Poison Control • Blood Borne Pathogen Control • Food Allergies • Supervision during high risk activities such as eating and outdoor play Identification and Reporting of Child Abuse & Neglect: <ul style="list-style-type: none"> • Definitions • Laws/regulations • Program policies/procedures Child Growth & Development for parents: *Planned learning activities discussed at parent meetings, parent/teacher conferences, workshops, and home visits *Newsletters share information on several of these areas also:	Certified Trainers , Oak Ridge Schools' system-wide nurse,	All staff	Appropriate safety practices and first aid procedures followed in the event of an emergency situation	Health Manager	New staff within the first 2 weeks on the job/other staff as needed by existing expiration date and/or SY2023-2024	Program Staff or Oak Ridge Schools' Employee		
Parent/Child Activities	Family Advocates and program staff	Children & families	Parents will become more involved in child's education	FCS Manager	SY 2023-2024	Provided by ORS and Program Staff		
Nutrition Staff will attend HS and CACFP Nutrition Training	CACFP, T/TA Network	Nutrition Manager	Knowledgeable staff that follow program policies, Head Start Performance Standards and state licensure requirements	Director	SY2023-2024	Paid from Base Grant		
Total to support Required Head Start Training								
Required Training	Resource	Target Audience	Expected Outcomes	Responsible Manager	Timeline	Estimated Cost		
Head Start Education Training: ~Classroom environment ~ Child Development ~ Assessment ~ Discipline & Guidance ~ Literacy & Handwriting ~Math ~Science ~Discovery ~ Art & Music ~ Dramatic Play ~ Cultural Diversity ~ Health & Wellness ~ Special curricula Training on Head Start performance standards ~STEM	Direct Service & Management staff T/TA network	Teaching staff	Teaching staff will become more knowledgeable and confident in providing quality educational services to children and their families	Education Coordinator	SY2023-2024	Provided by ORS and Program Staff		
Required Training, continued	Resource	Target Audience	Expected Outcomes	Responsible Manager	Timeline	Estimated Cost		
~ Agency policies and procedures, including program philosophy ~ Emergency Procedures ~ Job Description ~ Reporting requirements for suspected cases of child abuse and neglect ~ Discipline policies ~Policies for dismissing and receiving children	Admin. Staff	All Staff	Knowledgeable staff that follow program policies, Head Start Performance Standards and state licensure requirements	Director, Education Coordinator	SY 2023-2024	Provided by Program staff and Community Partners		
~ Parent-Teacher Communication ~ Disease Control ~ Health Promotion ~ Overview of Licensing Requirements ~ Information on Risks (Infection, Stress, CMV)	Admin. Staff	All Staff	Knowledgeable staff that follow program policies, Head Start Performance Standards and state licensure requirements	Family & Community Services Manager, Health Manager, and Education Coordinator	SY2023-2024	Provided by Education Coorfinator and Health Manage		

T/TA Plan 2023-2024
 Delegate: Oak Ridge Schools' Preschool/Head Start

24 Clock Hours of Training as follows: ~ Six (6) hours (CPR/First Aid, CACFP, Childhood Food Allergies, Injury Control) ~ Two(2) Hours in Identifying and reporting child abuse ~ Ten (10) Hours of other related training (one to one consulting sessions, academic course, etc.) Supervision, parent communication, ~ Six (6) hours Literacy	Admin. Staff	All Staff	Knowledgeable staff that follow program policies, Head Start Performance Standards and state licensure requirements	Health Manager, and Education Coordinator	SY2023-2024	Provided by Program staff and Community Partners		
Total to support Required Training						\$0		
Total T/TA Plan						8,846	2/10/2023	



Oak Ridge Schools

PRESCHOOL

Board of Education Request for Approval

Preschool Head Start Continuation Grant 2023-2024

I respectfully request the approval of the Preschool Head Start Continuation Grant proposal for 2023-2024. This grant is the Continuation Grant. The amount requested in the grant is \$906,379. The basic grant is in the amount of \$897,533 and the T/TA is \$8,846 for the total of \$906,379. This grant provides the funding for 118 3 and 4 year old students.

The grant proposal is included.

Respectfully,

Mrs. Lisa M Downard

Principal

157 Carver Ave | Oak Ridge, TN 37830

lmdownard@ortn.edu | (865) 425-9101

www.ortn.edu

Every student prepared for college, career, and life success



Oak Ridge Schools
PRESCHOOL

NON-FEDERAL RESOURCES:

In-Kind Contributions:

<u>Type</u>	<u>Value</u>
--------------------	---------------------

Bus transportation services for Head Start students provided by the School District (LEA)	\$17,945
---	----------

All 118 Head Start students have the option to utilize bus transportation from school to home each school day. The School District (LEA) provides 7 school buses for the program's afternoon transportation. This is paid from state and/or local funds.

Each year at least 80 students utilize the one-way transportation. Our students attend 174 days each year. This breaks down to an approximate cost of \$1.84 per child per day for this service.

Salary and benefits of classroom staff being paid out of state and/or local funds

<u>Staff Position</u>	<u>Number of Staff</u>	<u>Percentage going toward NFS</u>	
Teacher	4	50%	\$208,650
TOTAL NFS			\$226,595

TOTAL NON-FEDERAL RESOURCES--\$226,595

GRANT STAFF:

<u>Position</u>	<u>Annual Salary</u>	<u>OHDS Share</u>	<u>USDA</u> <u>Share</u>	<u>% Time</u> <u>OHDS Grant</u>	<u>Hours</u>
<u>Director</u>	\$119,727	\$53,877	0	45%	940
<u>Ed Coordinator</u>	\$84,868	\$63,651	0	75%	1,271
<u>Bookkeeper</u>	\$47,648	\$23,824	0	50%	1,044
<u>ERSEA/Compliance</u>					
<u>Manager</u>	\$50,913	\$38,185	0	75%	1356
<u>Family/Community</u>					
<u>Svc. Manager</u>	\$50,913	\$30,548	0	60%	1,085
<u>Secretary</u>	\$44,036	\$22,018	0	50%	1,044
<u>Family Advocate (3)</u>	\$83,660	\$50,196	0	60%	2,373
<u>Data Manager</u>	\$15,875	\$7,938	0	50%	358
<u>Curriculum Coach</u>	\$39,959	\$23,975	0	30%	215
<u>Cert. Teachers (9)</u>	\$333,241	\$166,621	0	50%	5 3581
	\$303,105	\$75,776	0	25%	4 1,433
<u>Assist. Teachers (11)</u>	\$31,619	\$31,619	0	100%	2 2,865
	\$64,480	\$32,240	0	50%	3 2,149
	\$97,367	\$24,342	0	25%	3 1,433
	\$26,902	\$8,071	0	30%	1 430
	\$16,116	\$5,318	0	33%	1 473
<u>Duration—25 minutes</u>					
Every morning X 7 staff	\$18,579	\$18,579	0	100%	
<u>TOTAL</u>	\$1,429,008	676,778			

FRINGE BENEFITS:

ITEM	PERCENTAGE	X	BASE	AMOUNT
Social Security	0.062	X	\$676,778	\$41,960
Medicare	.0145	X	\$676,778	\$9,813

(Base is computed using actual salaries-pre-tax Cafeteria Plan)

Oak Ridge City Schools' Head Start Program-Delegate

Grant #04CH011524-04-001

Retirement—Certified	Variable	\$383,900	\$31,976
Retirement-Classified	Variable	\$274,300	\$14,022
Life Insurance	23 Employees X \$12.60 per month X 10 months (based on % of time per program)		\$1,254
Dental Insurance	23 Employees X \$36.53 per month X 10 months (based on % of time per program)		\$3,635
Vision Insurance	23 Employees X \$10.85 per month X 10 months (based on % of time per program)		\$1,080
Health Insurance	18 Employees at variable rates (based on % of time per program)		\$63,264

TOTAL

TOTAL SALARIES: 676,778

TOTAL FRINGE: \$167,004

***TRAVEL: P.A. 22 Basic Funding**

<u>Number of Trips</u>	<u>Destination</u>	<u>Length of Stay</u>	<u>Purpose</u>	<u>Participants</u>	<u>Cost</u>
1	Atlanta, GA	3 nights	RIVHSA Conf.	3 Staff	\$3,675
	Approx. cost per person	Hotel=600	Registration=475	Per Diem=150	
	Parking and Mileage costs for the trip, not per person		Mileage=150	Parking=150	
1	Tennessee	1 nights	TN HS Directors	Director	\$425
	Approx. cost per person	Hotel=250	Registration=0	Per Diem=75	Mileage=100
1	Atlanta, GA	2 Nights	RIVHSA Leadership Inst.	2 Staff	\$2,300
	Approx. Cost per person	Hotel=600	Registration=400	Per Diem=150	
	Parking and mileage costs are for the trip, not per person		Parking=150	Mileage=150	
1	Tennessee or Virtual	0 Nights	CACFP/Nutrition	1 Staff	\$250
	Approx. Cost per person	Hotel=0	Registration=175	Per Diem=75	

TOTAL P.A. 22-TRAVEL

\$6,650

***TRAVEL: P.A. 20 T/TA**

1	Atlanta, GA	3 nights	RIVHSA Conf.	3 Staff	\$4,096
---	-------------	----------	--------------	---------	---------

Approx. Cost per person Hotel=600 Registration=475 Per Diem=150

Parking and Mileage costs for the trip, not per person Mileage=150 Parking=150

1	Tennessee or Virtual	0 Nights	Child Plus	5 Staff	\$1,500
---	----------------------	----------	------------	---------	---------

Approx. Cost per person Hotel=0 Registration=300

TOTAL TRAVEL P.A. 20 T/TA \$5,596

*Note: All travel will be in the contiguous United States

EQUIPMENT: P.A. 22

Cost

There are no plans to purchase equipment at this time \$0

TOTAL P.A. EQUIPMENT \$0

SUPPLIES: P.A. 22 BASIC FUNDING

Cost

Postage \$300

Medical/Dental Supplies \$300

Local Travel (Home Visits) \$500

Disabilities Supplies (if needed) \$200

Classroom Supplies \$16,144

Data Processing \$500

Other Supplies/Family Engagement \$3,000

TOTAL P.A. SUPPLIES \$20,944

CONTRACTUAL: P.A. 22 BASIC FUNDING

<u>Organization</u>	<u>Purpose/Scope of Work</u>	<u>Period</u>	<u>Cost</u>
----------------------------	-------------------------------------	----------------------	--------------------

Anderson Co. Health	Medical and dental services for Head Start	Same as grant	\$500
---------------------	--	---------------	-------

Dept./dentists/dr.	children and families		
--------------------	-----------------------	--	--

Oak Ridge City Schools' Head Start Program-Delegate

Grant #04CH011524-04-001

Mental Health Consultant	Mental Health services for Head Start Children/fam.	Same as grant	\$4,000
Child Plus.net	To enable program staff to enter, access and retrieve Program information timely and effectively	Same as grant	\$1,375
Other Contracted Services	Social/Emotional screener, classroom software, Provide services for miscellaneous areas as needed	Same as grant	\$2,000
Teaching Strategies GOLD	To provide digital resources to support the Curriculum and classroom instruction	Same as grant 3-Year Renewal	\$17,032
Family Engagement/ Family Workshops	To provide families with knowledge and understanding To better support their child to be prepared for school *training specific for fathers *training/support regarding attendance	Same as grant	\$1,250
TOTAL P.A. 22 CONTRACTUAL			\$26,157

CONTRACTUAL: P.A. 20-T/TA

COST

Teaching Strategies Gold	To provide digital resources that allow teachers to upload curriculum studies and align individual student assessment data. To provide training for teaching staff .	Same as grant	\$750
Conscious Discipline And Love and Logic	To provide Conscious Discipline training materials For teaching staff and Love and Logic training materials For Head Start families	Same as grant	\$2,000
Mental Health Consultant	To support staff and provide professional development Related to self-care and mental health	Same as grant	\$500

TOTAL P.A. 20 T/TA CONTRACTUAL \$3,250

GRAND TOTALS:

P.A. 22-BASIC FUNDING \$897,533

P.A. 20-T/TA TOTAL \$8,846

TOTAL REQUEST FOR FEDERAL FUNDS \$906,379

2023-2024

Head Start Continuation Grant Year 4

Oak Ridge Schools' Head Start-Delegate

Table of Contents

Section 1. Program Design and Approach to Service Delivery

Sub-Section A: Goals (1, 2 a-b)	4
Broad Program Goal #1	4
Broad Program Goal #2	6
Broad Program Goal #3	11
School Readiness (3)	12
Sub-Section B: Service Delivery	12
Service and Recruitment Area (1)	12
Needs of Children and Families (2)	12
Chosen Program Option(s) and funded Enrollment Slots (3)	14
Centers and Facilities (4)	14
Eligibility, Recruitment, Selection, Enrollment and Attendance (5)	14
Education and Child Development (6)	16
Health (7)	17
Family and Community Engagement (8)	18
Services for Children with Disabilities (9)	20
Transition (10)	21
Services to Enrolled Pregnant Women (11)	21
Transportation (12)	21
Sub-Section C: Governance, Organizational, and Management Structure	22
Governance (1)	22
Human Resource Management (2)	22
Program Management and Quality Improvement (3)	23
Sub-Section II: Budget and Budget Justification Narrative	23
Budget Narrative (1)	23
Delegate Contract (2)	27
COLA (3)	27
Financial and Property Management System (4)	27

Non-Federal Resources (5)	28
Non-Federal Share Waiver (6)	28
15% Limitation of Administrative Costs (7)	28
Enrollment Reduction (8)	28
Conversion (9)	28
Purchase, Construction or Renovation of Facilities (10)	28
Equipment (11)	29

Sub-Section A: Goals

1. Additions, Deletions, or Revisions to Program Goals, Measurable Objectives, and Expected Outcomes

2A Progress on Objectives and Expected Outcomes

2B Challenges

1. Broad Program Goal #1

Broad Program Goal #1 - Oak Ridge Schools' Preschool/Head Start Program will increase family engagement within the program to build relationships with families to establish a positive school experience, strengthen the overall well-being of the family, and promote healthy child development.

There are no additions, deletions, or revisions to our Broad Program Goal #1.

Measurable Objective #1- The program will utilize Creative Curriculum to engage families in daily plans and learning experiences to support "at-home" learning. The program will show an increase from using less than 10 percent of the Family Engagement components in Creative Curriculum to using 100 percent of the components in 5 years as measured by our program checklist and curriculum fidelity tool.

There are no additions, deletions, or revisions to our Measurable Objective #1.

2.a. Progress/Outcomes MO#1- The Measurable Objective for 2021-2022 is for each classroom to utilize 40% of the Family Engagement components from Creative Curriculum. Currently all classrooms are utilizing 6 out of 8 components, or 75%. Eight major components make up the Family Engagement Checklist. Of these eight components, six components are included and implemented by all classrooms. All classrooms are now utilizing the *Letter to Families* at the beginning of each study, all classrooms have the lesson plans displayed and sent to families, all classrooms are using the Family Conference Form, all classrooms are sending home a Weekly Newsletter, all classrooms utilize a uniform communication tool, and utilizing Wow! Experiences and Classroom Visitors.

In addition to the items on the checklist, families also receive an additional school-wide newsletter each week. Through the school-wide newsletter, families receive information regarding school readiness and child development. Sections have included information on learning domains, mental health, community events, and community resources. Other topics have included the value of outside play, reading aloud, understanding phonological awareness, and supporting literacy at home.

b. Challenges MO#1-The challenge to the final two components relates to the demographic hardship our families face, including transportation, work schedules, and comfort level for being in an educational setting.

Action Plan to Address Challenges:

1. Volunteer training class for parents to help them feel equipped and comfortable when volunteering in the classroom.

2. Require documentation of all Family Engagement components on teachers' lesson plans.
3. Provide training for teachers for the learning games included with Creative Curriculum.
4. Provide training for parents for the learning games included with Creative Curriculum.
5. Provide training/modeling for families to support them in their use of the curriculum at home to further engage with their child's education.

Measurable Objective #2 – The program will show an increase, school-wide, in family volunteering and/or participation to become actively engaged in the development and learning of their child(ren). The program will show an increase from approximately 6% of families volunteering to 30%, as measured by Child Plus data.

Baseline- August 2019-February 2020- 6% of families volunteering within the school

2020-2021- Increase school-wide family volunteer participation by 4% ,to 10% of enrolled parents

2021-2022- Increase school-wide family volunteer participation by 5%, to 15% of enrolled parents

2022-2023- Increase school-wide family volunteer participation by 5% , to 20% of enrolled parents

2023-2024- Increase school-wide family volunteer participation by 5%, to 25% of enrolled parents

2024-2025- Increase school-wide family volunteer participation by 5%, to 30% of enrolled parents

There are no additions, deletions, or revisions to Measurable Objective #2.

2.a. Progress/Outcomes MO#2- As of 2/7/23, the program has had 31% of the families volunteering as measured by data collected throughout the year. While this percentage exceeds our goal for the year, the program will continue with the current goals as we work to develop systematic and continuing parent engagement. Volunteer opportunities have included in class and out of class opportunities, along with field trips, participating in our Policy Committee and Policy Council, and planning and helping with parties and special activities. Weekly program newsletters highlight a key component of the curriculum to help parents understand how the classroom functions to enable them to feel more comfortable volunteering in the classroom. The Family Engagement Manager received feedback from each teacher at the beginning of the year to determine how to best utilize teachers in each classroom. A training for parents was created based on this information. Each parent interested in volunteering in the classroom was then given individual training on the specific classroom rules, guidelines, and opportunities as well as basics on the use of

Conscious Discipline in the classrooms. The program continues to utilize the family engagement pieces in the curriculum such as inviting parents to speak to students as an “expert” related to a study.

b. Challenges MO#2- While the percentage of volunteers with the program has increased, the number may still be limited due to COVID-19 and other communicable illnesses. While visitors are allowed, many parents have chosen to limit their time in the building. While some parents are comfortable enough with technology to volunteer virtually, many are not. This has reduced the number of volunteers in our program.

Action Plan to Address Challenges:

1. Family Engagement Manager to continue to meet with families who have expressed the desire to volunteer to provide guidance regarding virtual options, at-home volunteer options, as well as in-classroom options.
2. Family Engagement Manager to continue meet with families to train/provide support around what “volunteering” looks like and what all volunteering entails.
3. To address any discomfort with volunteering in the building, we will plan a “Reading Challenge” week to encourage parents to volunteer by doing specific at home activities to academically support their children and logging that time.
4. Training families in the Creative Curriculum components as well as training regarding developmentally appropriate interactions with students in the classroom setting, how to read aloud, knowledge of interest areas and supporting children’s play will continue.

Measurable Objective #3 - The program will decrease the number of absences by working with families on the importance of on-going child development with daily learning opportunities. The number of severely chronic absences will decrease to less than 5% by the end of the 5-year grant cycle, as measured by absenteeism within Child Plus.

There are no additions, deletions, or revisions to Measurable Objective #3.

2 a. Progress/Outcomes MO#3- As of 2/17/23, there are 14 students considered to be chronically absent. This results in 12% of enrolled students chronically absent with unexcused absences. Each of these families has received support from family services as well as the classroom staff to discuss the reason for the absences as well as provide support and services to improve attendance. Overall, and considering the situation with COVID-19 and other illness, the program’s Average Daily Attendance has been consistent with previous years. The current Average Daily Attendance is 87.14%. An infographic describing chronic absenteeism and its impacts on our children was developed and sent to community doctors, dentists, orthodontists, mental health providers, speech and occupational therapists, etc. to raise the awareness of this issue in hopes that appointments will not always be made during school hours and excuse notes will be limited to the time that the student needs to be out of school.

b. Challenges MO#3- Due to COVID-19, we have had families keep their child at home during various times when the community positivity rate has increased. As the threat of COVID-19 decreases, fewer precautions are being taken by families; i.e., wearing of masks, frequent hand washing. In addition, families are leaving their home more frequently to attend group gatherings. This has created a unique situation in which children are more susceptible to various illnesses such as strep throat, flu, colds, and intestinal illnesses.

Action Plan to Address Challenges:

1. Train parents regarding the daily instruction and interactions taking place within the curriculum to emphasize the importance and value of daily attendance.
2. Continue to strengthen relationships between family advocates, teachers, and parents to enhance communication between all parties.
3. Encourage parents' participation in various training opportunities.
4. Continue to educate parents regarding precautions being taken at the school to prevent the spread of all infectious diseases.

Broad Program Goal #2

Broad Program Goal #2- Oak Ridge Schools' Preschool/Head Start program will enhance educational services within classrooms, in the family setting, and within the community through professional development, family support, and community engagement to improve literacy, math, and cognitive skills.

There are no additions, deletions, or revisions to our Broad Program Goal #2

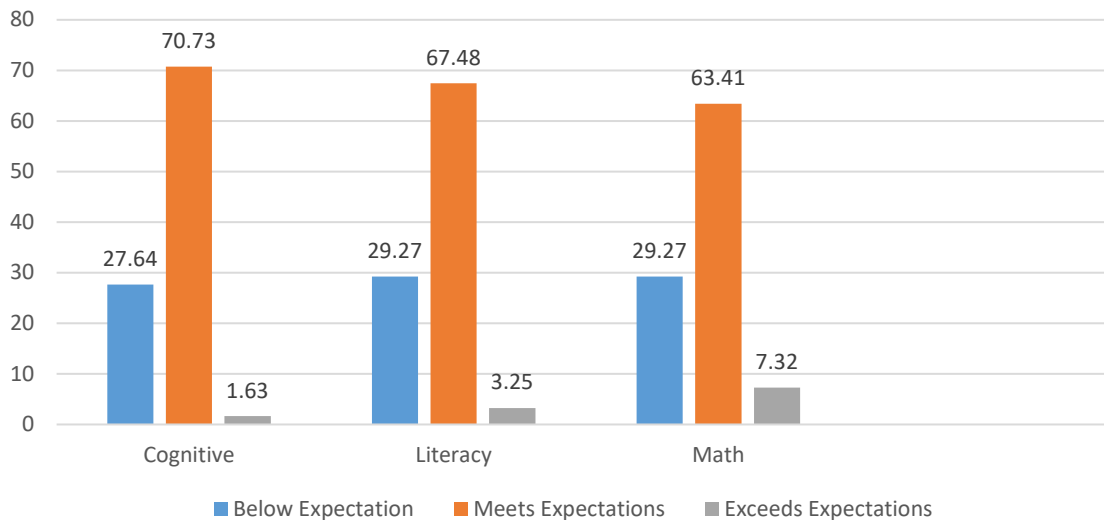
Measurable Objective #1- The program will show a decrease of 2% each year in students scoring below widely held expectations in the end of year data in literacy, as measured by Teaching Strategies Gold Assessment Tool.

There are no additions, deletions, or revisions to our Measurable Objective #1

2 a. Progress/Outcomes MO#1-

Literacy

Oak Ridge Schools' Preschool/HeadStart Spring 2021/2022 - Widely Held Expectations



The above graph shows data from Spring 2021-2022. The program ended with 29.27% below expectations, our expected outcome was 16.63% below expectation. While this was not the expected outcome, our Fall data at the October checkpoint showed 75.23% of students below expectations and Spring data at the May checkpoint ended with 29.29% below expectations. Thus, the program exhibited 45.96% growth during the school year.

b. Challenges MO#1- Implementing the curriculum to fidelity and ensuring the validity of specific data due to staff turnover. One-third of the classroom teachers were new, and this was their first year using Creative Curriculum. In addition to the new teachers the program experienced almost a complete turnover with family service staff and multiple teaching assistants resigning. Overall, the program experienced a 29% turnover rate for all staff. Furthermore, several of these vacancies took an extended period to fill. A high number of students entering the program with special needs also presents as a challenge for meeting our goal. The program saw a drastic increase of children with behavior and mental health concerns.

Action Steps to Address Challenges:

1. Coaching new staff in curriculum implementation.
2. Present continuing professional development regarding data collection and validity of data.
3. Teachers' full engagement in Professional Learning Communities (PLC's) to discuss child data and teaching practices.
4. Provide training to all staff on Conscious Discipline and purchased coaching with a Conscious Discipline trainer to work individually with teachers.

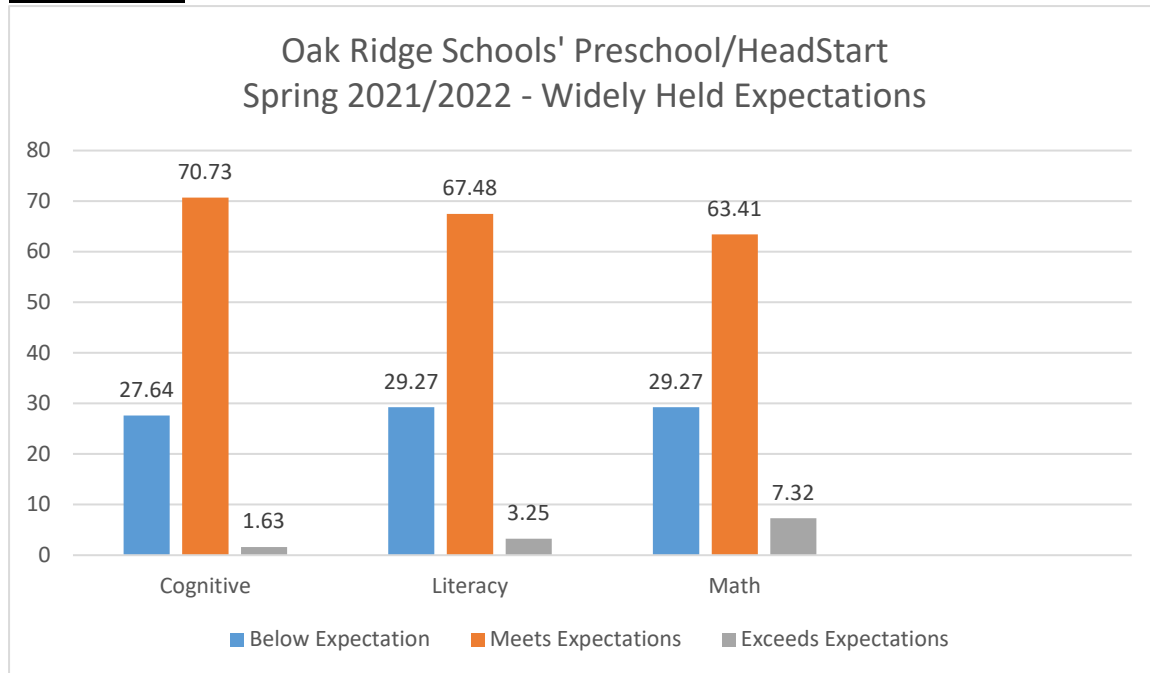
5. Collaborated with local mental health agency to house a full-time mental health therapist on site.
6. Purchased professional development videos through the curriculum that provide training and support for new staff.
7. Provide training for families regarding curriculum and developmental expectations to strengthen parent understanding for child development and learning.

Measurable Objective #2- The program will show a decrease of 2% each year in students scoring below widely held expectations in the end of year data in math, as measured by Teaching Strategies Gold Assessment Tool.

There are no additions, deletions, or revisions to our Measurable Objective #2

2 a. Progress/Outcomes MO#2-

Mathematics



The above graph shows data from Spring 2021-2022. The program ended with 29.27% below expectations, our expected outcome was 16.27% below expectation. While this was not the expected outcome, our Fall data at the October checkpoint showed 75.23% of students below expectations and Spring data at the May checkpoint ended with 29.27% below expectations. Thus, the program exhibited 45.96% growth during the school year.

b. Challenges MO#2- Implementing the curriculum to fidelity and ensuring the validity of specific data due to staff turnover. One-third of the classroom teachers were new, and this was their first year using Creative Curriculum. In addition to the new teachers the program experienced almost a complete turnover with family service

staff and multiple teaching assistants resigning. Overall, the program experienced a 29% turnover rate for all staff. Furthermore, several of these vacancies took an extended period to fill. A high number of students entering the program with special needs also presents as a challenge for meeting our goal. The program saw a drastic increase of children with behavior and mental health concerns.

Action Steps to Address Challenges:

1. Coaching new staff in curriculum implementation.
2. Present continuing professional development regarding data collection and validity of data.
3. Teachers' full engagement in Professional Learning Communities (PLC's) to discuss child data and teaching practices.
4. Provide training to all staff on Conscious Discipline and purchased coaching with a Conscious Discipline trainer to work individually with teachers.
5. Collaborated with local mental health agency to house a full-time mental health therapist on site.
6. Purchased professional development videos through the curriculum that provide training and support for new staff.
7. Provide training for families regarding curriculum and developmental expectations to strengthen parent understanding for child development and learning.

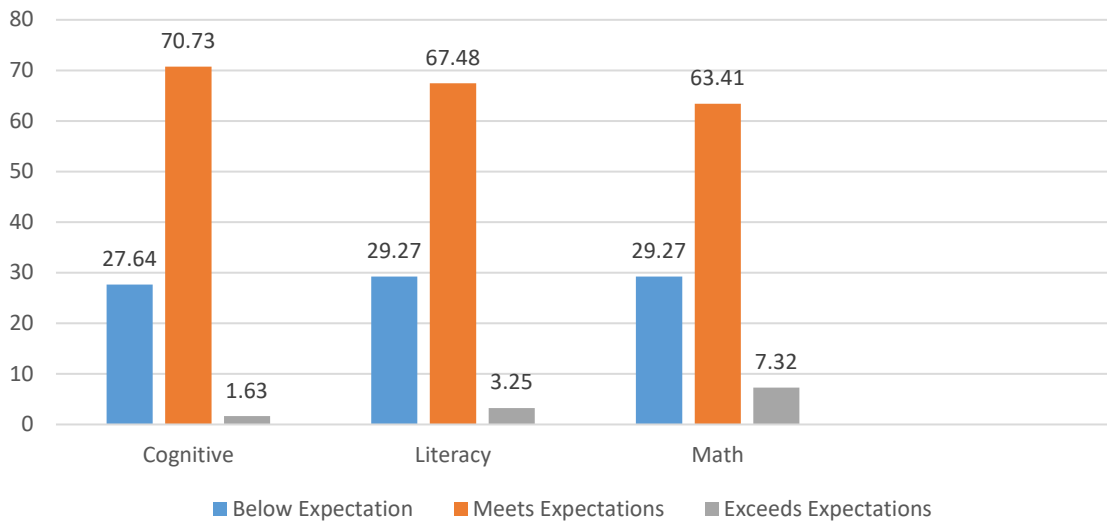
Measurable Objective #3- The program will show a decrease of 2% each year in students scoring below widely held expectations in end of year data in the cognitive domain, as measured by Teaching Strategies Gold Assessment Tool.

There are no additions, deletions, or revisions to our Measurable Objective #2

2 a. Progress/Outcomes MO#3-

Cognitive

Oak Ridge Schools' Preschool/HeadStart
Spring 2021/2022 - Widely Held Expectations



The above graph shows data from Spring 2021-2022. The program ended with 27.64% below expectations, our expected outcome was 15.65% below expectation. While this was not the expected outcome, our Fall data at the October checkpoint showed 66.97% of students below expectations and Spring data at the May checkpoint ended with 27.64% below expectations. Thus, the program exhibited 39.33% growth during the school year.

b. Challenges MO#3- Implementing the curriculum to fidelity and ensuring the validity of specific data due to staff turnover. One-third of the classroom teachers were new, and this was their first year using Creative Curriculum. In addition to the new teachers the program experienced almost a complete turnover with family service staff and multiple teaching assistants resigning. Overall, the program experienced a 29% turnover rate for all staff. Furthermore, several of these vacancies took an extended period to fill. A high number of students entering the program with special needs also presents as a challenge for meeting our goal. The program saw a drastic increase of children with behavior and mental health concerns.

Action Steps to Address Challenges:

1. Coaching new staff in curriculum implementation.
2. Present continuing professional development regarding data collection and validity of data.
3. Teachers' full engagement in Professional Learning Communities (PLC's) to discuss child data and teaching practices.
4. Provide training to all staff on Conscious Discipline and purchased coaching with a Conscious Discipline trainer to work individually with teachers.
5. Collaborated with local mental health agency to house a full-time mental health therapist on site.

6. Purchased professional development videos through the curriculum that provide training and support for new staff.
7. Provide training for families regarding curriculum and developmental expectations to strengthen parent understanding for child development and learning.

Broad Program Goal #3

Broad Program Goal #3- Oak Ridge Schools' Preschool/Head Start program will collaborate with families and work with community partners to support families' progress toward improved well-being and financial stability.

There are no additions, deletions, or revisions to Broad Program Goal #3

Measurable Objective #1- The program will work to have 90% of families reporting that the resources provided by the school helped inform them on decisions to further their education to obtain a livable wage. This will be measured by surveys two times a year to ensure the families' needs are being met.

There are no additions, deletions, or revisions to Measurable Objective #1.

2 a. Progress/Outcomes MO#1 -According to the 2022-2023 Family Strengths and Interest Assessment, the average initial Financial Stability score for families in the program was 2.4, which falls in the Vulnerable Range. When assessed at the middle of the year, the average score had increased to 2.5. While still in the Vulnerable Range, progress was indicated. When rating themselves related to Financial Security, 42 parents reported significant concerns. Of these parents, none showed a decrease in reported Financial Security at the mid-year assessment. A total of 71% of families maintained their level of Financial Security, and 29% evidenced an increase in Financial Security ratings. A total of five of these families reported very significant financial concerns. Family Advocates worked individually with these families setting financial goals and 100% of these families were rated as improving Financial Security at midyear. These results came from linking the families with job skill training, information regarding continuing education, budgeting/saving information, and similar resource referrals. The program is currently researching and establishing working partnerships with community agencies and programs which can assist all families. Families were able to attend a Resource Fair at the beginning of the year to learn firsthand about available community resources and ask any questions they may have. Family Advocates provide families with information and support in accessing the available resources and services, and assistance with applying for support when needed. Parents are provided with free tax assistance and other legal services through Legal Aide to address some barriers to education or employment. A dedicated workspace with laptop was created in the building for parents to utilize to apply for jobs, write a resume, apply to school, or apply for any needed resources.

b. Challenges MO#1- Inflation has risen in our community, especially in the areas of housing and food costs. Our community has a lack of affordable quality childcare programs that can enable parents to obtain and maintain employment. Continued high levels of communicable illnesses among young children have also made maintaining employment difficult for many of our families. Of the five staff members in Family Services, four are new this year and require training to learn ways to help families address financial insecurity and community resources that are available.

Action Plan to Address Challenges:

1. Continue to host the Resource Fair and invite any new or expanded service providers.
2. We will connect families with local resources such as Roane State Community College and career/job resources offered by the state as well as local career fairs.
3. We will continue to connect parents with other child-care programs within the community who provide child-care in the evenings.
4. We will continue to advertise the availability of a confidential parent workspace in the building.
5. Near the end of the 2022-2023 school year, parents needing individualized help with Financial Security will be surveyed to determine if the resources and assistance provided have helped them to make better financial and educational decisions.

Measurable Objective #2- The program will increase the overall well-being for health, mental health and nutrition of our parents and families through gained knowledge.

There are no additions, deletions, or revisions to Measurable Objective #2.

2 a. Progress/Outcomes MO#2 The use of the Family Strengths and Interest Inventory helped to identify families that experience deficits in mental health. Family Advocates worked individually with these families to link them with needed mental health services and resources. Through our partnership with a local mental health agency, a total of 34 families were provided individual and family therapy services within the preschool building along with services in the home as needed and over the summer. Parents were able to participate in Love and Logic Parenting Classes, Conscious Discipline Parenting Seminar, and later in the spring opportunities for Nurture the Next parenting classes. The program offered CPR training to parents to increase their knowledge and confidence in keeping their families safe along with basics in First Aid and responding to a person who is choking. Later in the spring, parents will be able to participate in the Steward of Light training related to identifying, preventing, and responding to child abuse in our community.

b. Challenges MO#2- Having four of five Family Services staff members being new hires this year has been a challenge. During COVID, family events and training were all virtual, and families are now getting used to in person events returning. Some families lack sufficient insurance to cover mental health services. When the in-house mental health provider has a full case load, we find other agencies have long waiting lists for services.

Action Plan to Address Challenges:

1. The program will continue to work with UT Extension and other local agencies to explore and provide these opportunities for families.
2. Family Services staff continue to receive training and supervision regarding their jobs, including training and support of Anderson County Head Start.
3. Family Advocates will assist families in applying for health coverage or obtaining assistance through the Behavioral Health Safety Net.

3. School Readiness

There were no additions, deletions, or revisions to the program's School Readiness Goals.

4. Program Goals

There were no additions, deletions, or revisions to our Program's three Broad Goals.

Sub-Section B: Service Delivery

1. Service and Recruitment Area

There were no changes to the service and recruitment area.

2. Needs of Children and Families

(a-c)

As evidenced by the Community Assessment update in 2022-2023, areas of need include:

- Continued collaboration with community partners so that appropriate referrals for children and parents are made to support a healthy and safe life. Specific needs indicated by the Community Assessment included families experiencing homelessness as well as families experiencing domestic violence and opioid misuse.
- Continue to provide families and staff with resources that support good mental health for staff members and families.
- Provide families and staff with resources to reduce food-insecure homes.
- Provide families and staff with resources to support the increasing population of English Language Learners.

The above-listed needs are reflective of the Community Assessment Update that has occurred since the Community Assessment in 2019.

The program is in the first year of program-wide implementation of Conscious Discipline. An all-day training event in October included all staff. Additional training is scheduled for all staff in April. Training for families for Conscious Discipline for the home environment took place in October as well. Conscious Discipline supports a mentally healthy culture for classrooms and throughout the school. In addition, to support the mental health of staff, children, and families, the program has collaborated with a mental health consultant through whom training, and support have been provided. This partnership is also providing a school-based counselor to serve our students and families. In response to food insecurities, the program collaborates with community partners and local churches to keep families informed of available food pantries and community-wide meal availability.

3. Chosen Program Option(s) and Funded Enrollment Slots

There are no changes to the program options or the funded enrollment slots.

4. Centers and Facilities

a. There are no changes to the Centers and Facilities. The program serves students at 157 Carver Ave., Oak Ridge, TN 37830.

b. There are no renovations or repairs requested with this application.

c. There are no activities requested that are subject to 1303 Subpart E.

5. Eligibility, Recruitment, Selection, Enrollment, and Attendance

Eligibility

There have been no changes to Eligibility for the program. The program continues to follow The Head Start Performance Standards to ensure all requirements are being met to serve the most vulnerable and at-risk families. Ongoing monitoring ensures compliance.

Recruitment

- a. The program continues recruitment within the community through various community events. Some examples include in fall 2022, the program participated in trunk or treat events at the Oak Ridge High School, Willow Brook Elementary School, and the city-wide event with the Oak Ridge Recreation and Parks Department. We are now community partners with the Children's Museum

of Oak Ridge. We are looking to schedule recruiting events in collaboration with their Museums for All initiative and other planned activities. Recruitment flyers are continuously distributed in the community. The program continues to maintain a community presence through the use of social media by having Facebook, Twitter and Instagram accounts. These accounts are also linked to the LEA's social media accounts for broader outreach. In spring 2022 the program conducted their annual Child Find event. This event provides the program staff the opportunity to meet parents face-to-face, collect information regarding their child as well as their family situation, and often meet the child to provide some initial observation. All of this information is critical to developing the relationship with families.

- i. The program continues to collaborate with local physicians and TEIS, local agencies, and the LEA to recruit and enroll vulnerable children. To date, 24.6% of the enrolled students receive special education services.

Selection

In response to identified needs within the Community Assessment update and recommendations by the Policy Committee, the program has added the following updates to the selection criteria:

- Added "Kinship Care" to Homeless
- Increased points given for no insurance in household
- Increased points given for a referral by other agency

- Changed wording and increased points for “limited peer socialization” to “no prior group experience”
- Removed “lack of affordable and accessible childcare
- Added “older sibling currently enrolled”
- Added “previous Head Start family”

Enrollment

The program continues with funding for 118 Head Start students. The program has maintained full enrollment all year.

Attendance

- b. In response to efforts for continuous improvement, the program addresses chronic absenteeism in Broad Program Goal #1, Measurable Objective #3.

Due to the COVID-19 pandemic, the program follows the CDC recommendations regarding student illness and exclusion from school due to symptoms. These absences are “excused” and do not affect a student’s enrollment.

The following chart reflects the program’s current Average Daily Attendance and a comparison with the previous year.

2020-2021	90.26%
2021-2022	87.81%
2022-2023	87.14 as of 2/7/23

It is important to note that students who must quarantine due to COVID-19 close contact are not considered absent. These students receive at-home activities from their teacher that correlate with the current Study.

6. Education and Child Development

- a. The program continues to be a center-based program.
 - i. There are no changes to this area. The program continues to implement the Creative Curriculum for Preschool.
 - ii. No changes have occurred in the area of curriculum.
 - iii. No changes have occurred in the curriculum alignment.
 - iv. No changes have occurred in the support of staff to implement curriculum with fidelity.
- b. The program does not offer home based program.
- c. No changes have occurred to this area.
- d. No changes have occurred in the opportunities offered to parents to engage in their child's education.
- e. The program still does not serve AIAN children.

7. Health

a. The Community Assessment update indicated the need for continued collaboration with community partners to support the health and safety of children and families as well as supporting the mental health of staff and families. The program continues the partnership with a local agency to provide a full-time, school-based counselor to provide mental health support for students, families, and staff.

The program continues to follow all CDC guidelines related to sanitizing as prevention for the spread of contagious diseases. Families receive information related to current CDC guidelines, available health resources, and information related to nutritional, mental, social/emotional, and oral health through a weekly newsletter.

i. The program continues oversight to ensure up-to-date health, dental, and ongoing care for students.

ii. No changes at this time.

8. Family and Community Engagement

a. The program strives to fully engage families as we continue to return to more normal programming following COVID 19 restrictions. The staff has ensured that families are informed and included. The program uses educational apps, See Saw, “Microsoft Teams” meetings, social media, and phone calls to remain up to date on what is occurring in the classroom. We also keep a large bulletin board with parent information updated in our lobby. In addition, parents receive two weekly newsletters via See Saw. One newsletter comes directly from the teacher with classroom related information. The other is a school-wide newsletter with program-wide information as well as information from each service area and community information/resources. Parents are encouraged to volunteer within the program. Volunteering may be done in-person or virtually. Family Members may read with the class, participate during Interest Area Time, assist during meals or rest time, present as an “expert” in a topic related to the curriculum, or assist the teacher with classroom tasks. Parents may participate with the Parent Committee (Parent Advisory Team), serve on Policy Committee, and

participate in various parent training opportunities like Parenting with Love and Logic. During the 2022-2023 school year, there were 36 volunteers and 11 Policy Committee volunteers.

b. The program has been integrating more family events again since our pause during the COVID pandemic. We were able to offer CPR and Choking classes for parents, computer training classes for parents, Conscious Discipline Seminar for parents and Virtual Love and Logic Parenting Classes. So far in the 2022-2023 school year, we have engaged families in Parent Orientations, Open House, a Resource Fair, Family Picnic, Grandparent Breakfast, Conscious Discipline for parents, and in-person Love and Logic Parenting Classes. During the remainder of this year, we have plans for a Women's Self Defense Class, a Father and Friends Night, Nurture the Next Parenting Classes, Stewards of Light Training around child abuse, a STEAM Night for families, and Father and Friends Playground Nights.

c. The program has continued with the use of Parenting with Love and Logic as the parenting curriculum and has begun in-person training again. Parenting with Love and Logic curriculum is also offered in Spanish. We also provided families with an in-person Conscious Discipline Seminar. Both curricula are research based.

d. i. and ii. The program has continued to support families using the Family Strengths and Interests Inventory and Family Goal Setting. At the time, 96% of our students' families set individual goals with their Family Advocates. Each Advocate then follows up with the family regarding the goal and any progress or obstacles, providing support and referrals as needed.

Family Goals **Some family goals fall under more than one category

PFCE Framework	Percent of family goals
Family well-being	81%
Positive Parent-Child Relationships	41%
Parents as Lifelong Educators	22%
Families as Learners	35%
Family Engagement in Transitions	23%
Family Connection to Peers and Community	22%
Families as Advocates and Leaders	6%

e. The program continues to facilitate access to services and resources in the community that are responsive to family partnership goals and children’s needs. This continues to be done through community partnerships such as UT Extension, Legal Aid, WIC, Oak Ridge Schools Family Resource Center, Bryson’s Closet Thrift Store, the Ecumenical Storehouse, Helping Mamas, among others. Because we had new Family Services staff, outreach meetings were scheduled with many agencies including United Way, American Job Center, Roane State Community College Re-Connect, Oak Ridge Housing Authority, CASA of the TN Heartland, ADFAC, the Family Justice Center, and Nurture the Next. The program has connected families to resources to provide assistance for things such as rent and/or utilities, school supplies, clothing, and Food For Kids.

No other updates or changes have been made to this area.

9. Services for Children with Disabilities

a. and b. We continue to collaborate with the LEA and offer services on-site.

Following the LEA's recommendations all services are now on site and virtual is not an option. All IEP meetings are held in-person unless the family is unable to attend due to COVID related quarantining. Allowances have been made to complete these meetings virtually to accommodate the families. As of 2/7/23, 24.6% of students are receiving Special Education Services.

10. Transition

a. No changes at this time.

b. No changes at this time.

c. No changes have occurred in supporting successful transitions.

11. Services to Enrolled Pregnant Women

The delegate program does not serve pregnant women with an Early Head Start service. However, we do refer to the recipient, who serves Early Head Start infants through 3 years old in our geographical area.

12. Transportation

There have been no changes to transportation. We partner with the LEA to provide transportation services.

Sub-Section C: Governance, Organizational, and Management Structures

1. Governance

There are no changes in the structure of members in the governing body.

2. Human Resource Management

a.-c. The program continues to operate under the auspices of the Oak Ridge City Schools' Human Resources Department.

d. No changes to coaching and professional development at this time.

Due to COVID-19, all staff were required to participate in specific training related to maintaining a safe and healthy environment during a pandemic. This training was conducted through "Safe Schools" online training program.

The program has a teaching assistant who acts as a "floater" to provide classroom support. This assistant's presence allows the classroom teacher to support a struggling student while instruction continues for the other remaining students. In addition, due to COVID-19, the program has experienced a shortage in the number of substitute teachers. The floater assistant is available to provide continuity of care in the event a substitute is not available.

3. Program Management and Quality Improvement

There are no additions, deletions, or changes to this area at this time.

Section II. Budget and Budget Justification Narrative

1. The delegate, in submission of this application, is requesting \$8897,533 for the basic grant and \$8,846 for T&TA, totaling \$906,379. The total funded enrollment is 118.

a.-b.) Salaries & Fringe Benefits: ORS Preschool/Head Start personnel are paid on the Oak Ridge City Schools' pay scale. These costs run high because employees receive step increases and any COLA approved by the board of education or mandated by the state. A step increase (an added year of experience) is added to all classified and certified personnel salaries each year up to 15 years of service with an additional step increase occurring at 20 years of service. A benefit package that includes health, dental, vision and life insurance is provided as an option for all full-time employees. Full-time employees also receive Tennessee Consolidated Retirement System membership. All school employees receive paid personal leave, paid sick leave and have the opportunity to invest in tax-deferred annuities and cafeteria plans for medical and childcare needs. There is no information at this time regarding a change in the cost of medical, dental, or retirement. At this time, there is no available information on whether there will be an increase to the closed pension plan contribution rate for certified personnel, the hybrid retirement plan or the rate for classified personnel participating in TCRS, so those amounts have remained the same.

ORS Preschool/Head Start hires teachers who are state certified in early childhood, in accordance with Oak Ridge Schools' policies. This provides the program with teachers who are highly qualified in early education and are experts in working with children to achieve school readiness goals.

When calculating the FY23 budget the following factors were considered:

- Prepare budgets with salary increases according to the district's salary schedule.
- Prepare budgets with no increase in any of the retirement plans, or medical, life, dental, or vision insurance

c.) Travel: Within this category, monies are allotted to administrative and support staff for professional development. It is advantageous for the administration and staff to attend training opportunities to enhance the program's scope of services. While the program's basic travel dollars remain at a minimum, the program plans to utilize these funds to take advantage of conferences, workshops, training, and lectures that are content area specific. Staff development will include conferences and/or training in the areas of Head Start, CLASS, Child Plus, Conscious Discipline, Creative Curriculum, Teaching Strategies GOLD, and other opportunities that align with the school readiness goals, self-assessment goals, community assessment goals, and research-based assessment. These training opportunities may be in-person or virtual in nature.

d.) Equipment: The program has no plans to purchase equipment at this time.

e.) Supplies: Funds will also be used to purchase supplies. Supplies necessary for administering the program include office, instructional materials, and miscellaneous supplies that allow the program to adhere to program performance standards and state licensing requirements. The program supplies toothbrushes and toothpaste for the Head Start children to use at home. Due to COVID-19 restrictions, oral hygiene supplies are not being used in the classrooms. Dental supplies are provided for students' use at home. The program also purchases gloves for the staff to wear when performing hygiene activities with the children, as well as for situations that warrant a personal protection barrier. Other supplies such as diapers, baby wipes, facial tissue, band-aids, etc. are

purchased as needed, but the program strives to utilize community partnerships to fulfill those needs whenever possible. If a child with a disability has a special need for materials in the classroom, those materials are purchased as well. Classroom instructional supplies include, but are not limited to, crayons, construction paper, glue, manipulative materials, evaluating tools, and any other supplies needed to maintain an educationally appropriate learning environment for the Head Start children. The better the classrooms are supplied with age-appropriate materials for the children and proper teaching materials for our staff, the better equipped both parties will be to attain school readiness goals. Having the necessary supplies and support to carry out program goals is critical.

f.) Contractual Services: The Oak Ridge Schools' Preschool/Head Start program has an agreement with the Anderson County Health Department to provide dental services to children who are not established with a private dentist. If the family does not have TennCare (Medicaid) or private insurance, the dental staff bills Oak Ridge Schools' Preschool/Head Start Program using their sliding fee scale for services. The health department also provides physical exams for children when the parent has not yet secured a medical home. The program strives to exhaust all other avenues before any program monies are spent for these purposes. The program also contracts with a licensed mental health consultant to provide classroom observations, recommendations, feedback, and training regarding program improvements in the area of establishing a caring and nurturing environment. In order to provide continuity of services, the mental health consultant and the mental health coordinator meet throughout the year. It is understood within the health and education arena that a child will be at their optimum learning ability when health and nutrition issues do not present themselves as barriers.

Therefore, to foster school readiness in our program's children, it is imperative we continue to fortify parents and children with appropriate avenues to meet these basic needs. The program currently serves all children breakfast, lunch, and snack (no snack on Wednesdays due to short days) with funds received through a Child and Adult Care Food Program (CACFP) grant. In addition, contractual dollars are used for Head Start dues, student database software, and educational software.

g.) Construction: The program is not requesting funds for the purchase, construction or major renovation of facilities.

h.) Other: The program budgets for parent activities throughout the year to offer opportunities for socialization with other parents of young children, as well as educational training that increases parents' knowledge of school readiness and that meets required training. In 2018-2019, the program purchased the evidence-based parent curriculum, Love and Logic. The program will purchase additional parent workbooks as needed to continue this program for the 2023-2024 school year. Parent activities are scheduled throughout the year and include the whole family. In addition, separate activities are offered that provide fathers an opportunity to actively participate in their child's learning experience. These activities have incidental expenses. Parents and children are afforded extra-curricular activities. Monies are set aside to enhance the children's learning experiences by offering field trips outside the classroom. Also included in this category of the budget are expenses that are incurred on a regular basis such as funds for staff to make home visits, maintenance of office equipment, vehicles, and playground equipment. The program must also budget for copying and postage charges.

i.) Direct Costs: All direct costs are outlined in sections a. – h. as detailed above.

j.) Indirect Costs: The indirect cost is calculated and removed from the delegate's budget prior to receiving any funds.

2. Delegate Agency Contract: Oak Ridge Schools' Preschool/Head Start is a delegate agency and the only contract is with the recipient.

3. COLA: At this time, the program has not been instructed to request any COLA funds.

4. Financial and Property Management System: The Oak Ridge Schools' Preschool/Head Start program is fully integrated within the management and oversight of the policy committee, the Oak Ridge School District's Board of Education (ORSBOE), and ultimately Anderson County Schools' Board of Education (ACSBOE). The financial management of the program is accomplished by using the structure set by the ORSBOE. This is a distributive system that lends itself to providing strong internal controls and segregation of duties, while also providing proper oversight and management of all aspects of the financial management system. Additionally, annual audits are conducted by an independent audit firm to ensure compliance with federal, state, and local laws. The Oak Ridge Schools' Preschool/Head Start program follows the policies and procedures set by the school district to maintain effective control of and accountability for grant funds, property, and other assets unless a more stringent standard is set forth in Head Start Performance Standards. These district policies can be found on the Oak Ridge School district's website under the "Central Office" tab, then by clicking the "Policies" link. These policies follow, at a minimum, the State and Federal requirements for effective control and accountability for grant funds, property, and other assets.

5. **Non-Federal Resources:** Our 20% non-Federal share match is accomplished through:

- A portion of the salaries and benefits of 4 Head Start teachers who are paid out of state and/or local funds. Each of these teachers' classrooms are blended classrooms with Head Start students, VPK students, and Title 1 students. The total of these salaries and benefits equals \$208,650.
- A portion of the cost of afternoon bus transportation for our Head Start students is paid with local funds. The total used for non-Federal share is \$17,945.

6. **Non-Federal Share Waiver:** The program does not propose a waiver of the non-federal share.

7. **Administrative Cost Waiver:** The program is not proposing a waiver of the 15% limitation on development and administrative costs.

8. **Enrollment Reduction:** The program does not request an enrollment reduction.

9. **Conversion:** The program is not requesting a conversion.

10. **Purchase, Construction, or Major Renovation:** The program is not requesting funds for the purchase, construction, or major renovation of facilities.

11. **Equipment:** The program is not requesting funds for equipment.

Oak Ridge Board of Education

Monitoring: Review: Annually, in September	Descriptor Term: Code of Ethics	Descriptor Code: 1.106	Issued Date:
		Rescinds: Article III	Issued: 04/28/14 08/20/07

~~CODE OF ETHICS¹~~

~~OAK RIDGE SCHOOLS~~

~~Section 1. Definitions.~~

~~(1) "School district" means Oak Ridge Schools, which was duly created by a public or private act of the General Assembly; and which includes all boards, committees, commissions, authorities, corporations or other instrumentalities appointed or created by the school district or an official of the school district.~~

~~(2) "Officials and employees" means and includes any official, whether elected or appointed, officer, employee or servant, or any member of any board, agency, commission, authority or corporation (whether compensated or not), or any officer, employee or servant thereof, of the school district.~~

~~(3) "Personal interest" means, for the purpose of disclosure of personal interests in accordance with this Code of Ethics, a financial interest of the official or employee, or a financial interest of the official's or employee's spouse or child living in the same household, in the matter to be voted upon, regulated, supervised, or otherwise acted upon in an official capacity.~~

~~**Section 2. Disclosure of personal interest in voting matters.** An official or employee with the responsibility to vote on a measure shall disclose during the meeting at which the vote takes place, before the vote and to be included in the minutes, any personal interest that affects or that would lead a reasonable person to infer that it affects the official's or employee's vote on the measure. In addition, the official or employee may, to the extent allowed by law, recuse himself or herself from voting on the measure.~~

~~**Section 3. Disclosure of personal interest in non-voting matters.** An official or employee who must exercise discretion relative to any matter other than casting a vote and who has a personal interest in the matter that affects or that would lead a reasonable person to infer that it affects the exercise of the discretion shall disclose, before the exercise of the discretion when possible, the interest on the attached disclosure form and file the disclosure form with the school district's central office. In addition, the official or employee may, to the extent allowed by law, recuse himself or herself from the exercise of discretion in the matter.~~

~~**Section 4. Acceptance of gifts and other things of value.** An official or employee, or an official's or employee's spouse or child living in the same household, may not accept, directly or indirectly, any gift, money, gratuity, or other consideration or favor of any kind from anyone other than the school district that a reasonable person would understand was intended to influence the vote, official action or~~

~~judgment of the official or employee in executing decision-making authority affecting the school district.~~

~~It shall not be considered a violation of this policy for an official or employee to receive entertainment, food, refreshments, meals, health screenings, amenities, foodstuffs, or beverages that are provided in connection with a conference sponsored by an established or recognized statewide association of school board officials or by an umbrella or affiliate organization of such statewide association of school board officials.~~

~~**Section 5. Ethics Complaints.** The school district may create a School District Ethics Committee (the “Ethics Committee”) consisting of three members who will be appointed to one year terms by the Chairman of the Board of Education with confirmation by the board of education. At least two members of the committee shall be members of the board of education. The Ethics Committee shall convene as soon as practicable after its appointment and elect a chair and a secretary. The records of the Ethics Committee shall be maintained by the secretary and shall be filed in the office of the director of schools, where they shall be open to public inspection.~~

~~Questions and complaints regarding violations of this Code of Ethics or of any violation of state law governing ethical conduct should be directed to the chair of the Ethics Committee. Complaints shall be in writing and signed by the person making the complaint, and shall set forth in reasonable detail the facts upon which the complaint is based.~~

~~The School District Ethics Committee may investigate any credible complaint against an official or employee charging any violation of this Code of Ethics, or may undertake an investigation on its own initiative when it acquires information indicating a possible violation, and make recommendations for action to end or seek retribution for any activity that, in the Committee’s judgment, constitutes a violation of this Code of Ethics. If a member of the Committee is the subject of a complaint, such member shall recuse himself or herself from all proceedings involving such complaint.~~

~~The Committee may:~~

- ~~(1) — refer the matter to the Board Attorney for a legal opinion and/or recommendations for action;~~
- ~~(2) — in the case of an official, refer the matter to the school board body for possible public censure if the board body finds such action warranted;~~
- ~~(3) — in the case of an employee, refer the matter to the official responsible for supervision of the employee for possible disciplinary action if the official finds discipline warranted;~~
- ~~(4) — in a case involving possible violation of state statutes, refer the matter to the district attorney for possible ouster or criminal prosecution;~~

~~The interpretation that a reasonable person in the circumstances would apply shall be used in interpreting and enforcing this Code of Ethics. When a violation of this Code of Ethics also constitutes a violation of a personnel policy or a civil service policy, the violation shall be dealt with as a violation of the personnel or civil service provisions rather than as a violation of this Code of Ethics.~~

General¹

Board members and school district employees may not accept, directly or indirectly, any gift, money, gratuity, consideration, or favor that a reasonable person would understand was intended to influence the vote, official action, or judgment of the board member or employee in executing decisions affecting the school district. It is also prohibited for a board member's or an employee's spouse or child living in the same household to accept such items.

It shall not be considered a violation of this policy for a board member or employee to receive entertainment, food, refreshments, meals, health screenings, amenities, food, or beverages that are provided in connection with a conference sponsored by an established or recognized statewide association of school board officials or by an umbrella or affiliate organization of such statewide association of school board officials.

ETHICS COMPLAINTS

The Board may create a School District Ethics Committee (Ethics Committee), consisting of three (3) members who will be appointed to one-year terms by the Board Chair with confirmation by the Board. At least two (2) members of the committee shall be members of the Board. The Ethics Committee shall convene as soon as practicable after its appointment and elect a Chair and a Secretary. The records of the Ethics Committee shall be maintained by the Secretary and shall be filed in the Superintendent of Schools/designee's office, where they shall be open to public inspection.

Questions and complaints regarding violations of this Code of Ethics shall be directed to the Chair of the Ethics Committee. Complaints shall be in writing, signed by the person making the complaint, and include details as to the facts surrounding the complaint.

The Ethics Committee may investigate an ethical complaint received against a board member or employee and make recommendations to cease any activity that, in the Ethics Committee's judgment, constitutes a violation of this Code of Ethics. If a member of the Ethics Committee is the subject of a complaint, the member shall recuse himself/herself from all proceedings involving the complaint.

The Ethics Committee may:

1. Refer the matter to the board attorney;

2. In the case of a board member, refer the matter to the Board of Education for possible public censure, if warranted;

3. In the case of an employee, refer the matter to the Superintendent of Schools/designee for possible disciplinary action, if warranted; or

4. In a case involving possible violation of state statutes, refer the matter to the district attorney for possible ouster or criminal prosecution.

1
2
3
4
5
6
7
8
9
10

Legal References

1. TCA 8-17-103

Cross References

Board Member Conflict of Interest 1.107
Duties of Board Members 1.202

Legal References

1. TCA 8-17-103

Oak Ridge Board of Education

Monitoring: Review: Annually, in September	Descriptor Term: Board Member Conflict of Interest	Descriptor Code: 1.107	Issued Date:
		Rescinds: Article III	Issued: 04/28/14 08/20/07

~~A board member shall not be directly interested in any contract in which the Board may be interested. "Directly interested" means any contract with the board member or with any business in which the board member is sole proprietor, a partner, or the person having controlling interest. "Controlling interest" shall include the individual with the ownership or control of the largest number of outstanding shares owned by any single individual or corporation.~~

~~This policy shall not prohibit any board member from voting on the school budget or any budget amendments, unless the vote is on a specific budget amendment in which such board member is directly interested.~~

~~A board member shall not be indirectly interested in any contract in which the Board may be interested unless the board member publicly acknowledges such interest. "Indirectly interested" means any contract in which the board member is interested but not directly so, as defined above, including contracts in which the board member may have a direct interest but is the sole supplier of goods or services in the county.~~

~~Any board member who is an employee of the county/city and whose employment predates his/her initial election/appointment to the Board may vote on matters in which he/she has a conflict of interest if the member informs the Board immediately prior to the vote as follows: "Because I am an employee of (name of governmental unit), I have a conflict of interest in the proposal about to be voted. However, I declare that my argument and my vote answer only to my conscience and to my obligation to my constituents and the citizens the Board represents." The vote of any board member having a conflict of interest who does not inform the Board of such conflict shall be void if challenged during the same board meeting at which the vote was cast and prior to the transaction of any further business by the Board.~~

~~Any board member who is also an employee of the county/city and whose employment began on or after the date on which he/she was initially elected/appointed to serve on the Board shall not vote on matters in which he has a conflict of interest.~~

~~If a board member has a conflict of interest in a matter to be voted on by the Board, he/she may abstain for cause by announcing such to the chairman. Any board member who abstains from voting for cause on any issue coming to a vote before the Board shall not be counted for the purpose of determining a majority vote.[†]~~

PENALTY FOR UNLAWFUL INTEREST

1 ~~If a board member becomes directly or indirectly interested in any such contract, he/she shall forfeit all~~
2 ~~pay and compensation and shall be dismissed from the Board and be ineligible to serve in the same or~~
3 ~~similar position for ten (10) years.¹~~

4 5 General

6 State law provides specific instances when direct or indirect conflicts of interest may affect a board
7 member's ability to vote on certain matters.

8 Direct conflicts of interest may arise if the school district contracts with a board member or with a
9 business in which the board member is a sole proprietor, partner, or person having a controlling
10 interest.¹

11 Indirect conflicts of interest may arise if a board member votes on a matter involving a situation that a
12 reasonable person would infer affects his/her personal finances indirectly. If a board member has a
13 direct interest but is the sole supplier of goods or services in the city or county, he/she would be
14 considered indirectly interested in such a matter.²

15 **DIRECT CONFLICT OF INTEREST¹**

16 A board member shall not be directly interested in any contract in which the Board may be interested.

17 If there is a pre-existing contract that predates the board member's election to the Board, the board
18 member shall refrain from voting or discussing any matter related to that contract since he/she has a
19 direct interest. Upon expiration, the contract shall not be renewed by the Board.³

20 This shall not prohibit any board member from voting on the school budget or any budget amendments
21 unless the vote is on a specific budget amendment in which the board member is directly interested.⁴

22 **INDIRECT CONFLICT OF INTEREST²**

23 A board member shall not be indirectly interested in any contract where the Board may be interested
24 unless the board member publicly acknowledges such interest. The disclosure of this interest shall be
25 made at the board meeting in which the Board is taking action on the contract. A board member with
26 an indirect interest is not required to refrain from voting on the contract.

27 **PENALTY FOR UNLAWFUL INTEREST⁵**

28 If a board member is found to have an indirect interest and fails to disclose such interest, or becomes
29 directly interested in any contract, he/she shall forfeit all compensation. He/she shall also be dismissed
30 from the Board and be ineligible to serve in the same or similar position for ten (10) years.

1

Legal References

1. TCA 12-4-101(a); Op. Tenn. Att’y Gen. No. 10-46
2. TCA 12-4-101(b)
3. Op. Tenn. Att’y Gen. No. 99-209
4. TCA 12-4-101(a)(1)
5. TCA 12-4-102

Cross References

- Code of Ethics 1.106
Duties of Board Members 1.202

2

3

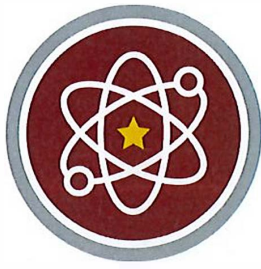
4

5

6

Legal References

1. ~~_____~~ TCA 12-4-101; TCA 12-4-102



Oak Ridge

SCHOOLS

Maintenance and Operations

DATE: February 20, 2023

TO: Bruce Lay, Executive Director of Leadership

FROM: Allen Thacker, Supervisor of Maintenance and Operations

SUBJECT: ORHS Welding Lab Equipment Purchase

Mr. Lay,

I am recommending that the Oak Ridge Schools Board of Education approve the contract with Holston Gases of Harriman TN to purchase and assembly of new welding lab and ventilation equipment for \$271,370.30.

This purchase was bid in accordance with state guidelines and Board of Education policy. Funding for this purchase is from CTE grant funds.

Thank you,

Allen Thacker

Supervisor of Maintenance and Operations.

Maintenance Office

100 Woodbury, Oak Ridge, TN 37830

(865) 425-3171

www.ortn.edu



Oak Ridge Schools

OFFICE OF
Business & Support Services

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

DATE: February 21, 2021

TO: Jenifer Van Dyke, Finance Director

cc: Dana Paolucci, Allen Thacker, Holly Cross

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

SUBJECT: Recommendation of RFP 23-004 Welding Remodel Project

I recommend that the Oak Ridge Board of Education accept the bid from Holston Gases for the above-mentioned bid. Their bid of \$271,370.30 met all required specifications. Three companies responded with bids.

Bids were advertised in accordance with state guidelines and made available on the Oak Ridge Schools' website and Vendor Registry.

Attachment: Bid Minutes



Oak Ridge Schools

OFFICE OF
Business & Support Services

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

Bid Minutes

02/15/2023

Welding Remodel Project (RFP 23-004)

Business Services Conference Room

Administration Building

Present for the bid opening were:

Greg Jackson
Allen Thacker
Holly Cross
Mary Ann Riley
Dana Paolucci

Holston Gases
Oak Ridge Schools Maintenance Supervisor
Oak Ridge Schools
Oak Ridge Schools Purchasing
Oak Ridge Schools Business Services Coordinator

Bid responses were received from the following companies:

	<u>Bid Amount</u>
Hastings Air Energy New Berlin, WI	\$259,000.00 *
Holston Gases Harriman, TN	\$271,370.30 **
Learning Labs, Inc. Calhoun, GA	\$318,198.00 (as specified)
Learning Labs, Inc. Calhoun, GA	\$309,020.00 (Alternate Bid)

*Disqualified due to nonconformance with all bid specifications

** **Recommended Bid Winner**



Oak Ridge Schools
TEACHING AND LEARNING

MEMORANDUM

Dr. Kelly Williams

Executive Director, Office of Teaching and Learning

TO: Board of Education

DATE: 2/22/23

SUBJECT: Item for Action: Approval of Network Refresh

I recommend the approval of the Network Refresh from Presidio and the Installation of the equipment from Encore Technologies at a total cost to the district of \$324,215.96. This recommendation is contingent upon receiving the E-Rate grant and the approval of proposed expenses in the FY24 budget.



Technology Department

127 Providence Road, Suite 100, Oak Ridge, TN 37830

Phone (865) 425-9015 Fax: (865) 425-9062 Email: technology@ortn.edu

Date: February 13, 2023

To: Kelly Williams

From: Doug Cofer, Director of Technology

Subject: Network Refresh / Labor and Installation

I recommend the purchase of the Network Refresh from Presidio and the Installation of the equipment from Encore Technologies at a total cost to the district of \$324,215.96. This recommendation is contingent upon receiving the E-Rate grant and the approval of proposed expenses in the FY24 budget.

This request leverages the federal E-Rate program for internal connections and local area network electronics (a.k.a., E-Rate, Category 2) to provide schools and libraries with capable network infrastructure at a significant discount. Once approved, the vendors (Presidio and Encore), and customer (ORS) have additional steps to complete with Universal Service Administrative Company (USAC, who administers the E-Rate grant for the FCC) before the filing deadline of March 28th

Bidding requirements for this purchase were met by competitive bid. The bid was advertised on the USAC Web site. The bids were due on January 18, 2023. There was a total of two responses to the bid request. This year, for Oak Ridge Schools, requested equipment and installation totals \$831,539.10. The amount that Oak Ridge Schools will need to pay is \$324,215.96, the balance will be covered by E-Rate.



Erate FY2023 Minibid

Encore Technology Group, LLC
141 Grace Drive
Easley, SC 29640
(888) 983-6267
www.encoretg.com

1015557
Version: 2

Prepared For
Oak Ridge Schools
Dr. Bruce Borchers
304 New York Ave
Oak Ridge, TN 37830
btborchers@ortn.edu
(865) 425-9001

Prepared By
Megan White
Phone: 864-307-2794
Email: mwhite@encoretg.com

Table with 5 columns: Services, Price, Qty, Extended. Row 1: Labor - Fixed, Encore Engineering Services, \$37,099.00, 1, \$37,099.00. Row 2: Services Subtotal, \$37,099.00.

Recap table with 2 columns: Recap, Amount. Row 1: Services, \$37,099.00. Row 2: Total, \$37,099.00.

Based on the rapidly changing market and global product shortages, we are seeing availability and lead times change daily. Please note that pricing and availability are subject to change. Encore will notify client of any surcharge fees as we are notified.

Currently, some manufacturers are requiring non-cancellation clauses on purchase orders. For those orders, Encore may also require a non-cancellation clause to be signed before an order can be processed.

All sales are exclusively subject to and conditioned upon the terms and conditions of sale posted at http://www.encoretg.com/terms-and-conditions, and any other additional or different terms are objected to and rejected unless Encore expressly agrees to them in a signed writing.

Signature

Date

TO: Oak Ridge Schools
Jeremy Russell
P.O. Box 6588
Oak Ridge, TN 37830

JLRussell@ORTN.edu
(p) (865) 425-9015

FROM: Presidio Networked Solutions
Eddie Orfale
12 Cadillac Drive
Suite 130
Brentwood, TN 37027

eorfale@presidio.com
(p) +1.407.641.0550

Customer#: OAKRI002
Account Manager: Jeff Hodges
Inside Sales Rep: Eddie Orfale
Title: Oak Ridge Schools - TN Mini Bid - Network-Refresh-DNA-3yr

Contract Vehicle: ERATE SOUTH

#	Part #	Description	Unit Price	Qty	Ext Price
Cisco					
C9606R-EDU					
1	C9606R-EDU	Cisco Catalyst 9600 Series 6 Slot Chassis, EDU Offering	\$5,365.57	2	\$10,731.14
2	C9600-NW-A	Cisco Catalyst 9600 Network Advantage License	\$0.00	4	\$0.00
3	S9600UK9-179	Cisco Catalyst 9600 XE 17.9 UNIVERSAL	\$0.00	2	\$0.00
4	C9600-CAMPUS-CORE	Catalyst 9600 Campus Core Deployment; For Tracking Only	\$0.00	2	\$0.00
5	C9606-FAN	Cisco Catalyst 9600 Series C9606 Chassis Fan Tray	\$0.00	2	\$0.00
6	C9606-SLOT-BLANK	Cisco Catalyst 9600 Series Blank for Chassis Module Slot	\$0.00	2	\$0.00
7	C9606-PWR-BLANK	Cisco Catalyst 9600 Series Blank for Power Supply Slot	\$0.00	2	\$0.00
8	PI-LFAS-T	Prime Infrastructure Lifecycle & Assurance Term - Smart Lic	\$0.00	6	\$0.00
9	PI-LFAS-AP-T-3Y	PI Dev Lic for Lifecycle & Assurance Term 3Y	\$0.00	6	\$0.00
10	C9600-SUP-1	Cisco Catalyst 9600 Series Supervisor 1 Module	\$16,146.38	2	\$32,292.76
11	C9K-F2-SSD-240GB	Cisco Catalyst 9600 Series 240GB SSD Storage	\$1,242.03	2	\$2,484.06
12	C9600-SUP-1/2	Cisco Catalyst 9600 Series Redundant Supervisor 1 Module	\$16,146.38	2	\$32,292.76
13	C9K-F2-SSD-240GB	Cisco Catalyst 9600 Series 240GB SSD Storage	\$1,242.03	2	\$2,484.06
14	C9600-LC-24C	Cisco Catalyst 9600 Series 24-Port 40GE/12-Port 100GE	\$11,178.26	2	\$22,356.52
15	C9600-LC-48YL	Cisco Catalyst 9600 Series 48-Port 25GE/10GE/1GE	\$9,836.87	2	\$19,673.74
16	C9600-PWR-2KWAC	Cisco Catalyst 9600 Series 2000W AC Power Supply	\$1,242.03	6	\$7,452.18
17	CAB-TA-NA	North America AC Type A Power Cable	\$0.00	6	\$0.00
18	NETWORK-PNP-LIC	Network Plug-n-Play Connect for zero-touch device deployment	\$0.00	2	\$0.00
19	C9600-LC-24C	Cisco Catalyst 9600 Series 24-Port 40GE/12-Port 100GE	\$11,178.26	2	\$22,356.52
20	C9600-DNA-A	Cisco Catalyst 9600 DNA Advantage Term License	\$0.00	2	\$0.00
21	C9600-DNA-A-3Y	Cisco Catalyst 9600 DNA Advantage 3 Year License	\$11,828.85	2	\$23,657.70
Total:					\$175,781.44

C9500-48Y4C-EDU					
22	C9500-48Y4C-EDU	Catalyst 9500 48-port x 1/10/25G and 4-port 40/100G , EDU	\$10,023.18	21	\$210,486.78
23	C9K-PWR-650WAC-R	650W AC Config 4 Power Supply front to back cooling	\$0.00	21	\$0.00
24	CAB-9K12A-NA	Power Cord, 125VAC 13A NEMA 5-15 Plug, North America	\$0.00	42	\$0.00
25	C9K-T1-FANTRAY	Catalyst 9500 Type 4 front to back cooling Fan	\$0.00	42	\$0.00
26	C9500-DNA-48Y4C-A	C9500 DNA Advantage, Term License	\$0.00	21	\$0.00
27	C9500-DNA-A-3Y	Cisco Catalyst 9500 DNA Advantage 3 Year License	\$5,725.16	21	\$120,228.36
28	NETWORK-PNP-LIC	Network Plug-n-Play Connect for zero-touch device deployment	\$0.00	21	\$0.00
29	C9500-NW-A	C9500 Network Stack, Advantage	\$0.00	21	\$0.00
30	PI-LFAS-T	Prime Infrastructure Lifecycle & Assurance Term - Smart Lic	\$0.00	63	\$0.00
31	PI-LFAS-AP-T-3Y	PI Dev Lic for Lifecycle & Assurance Term 3Y	\$0.00	63	\$0.00
32	C9K-F1-SSD-BLANK	Cisco pluggable SSD storage	\$0.00	21	\$0.00
33	C9500-SSD-NONE	No SSD Card Selected	\$0.00	21	\$0.00
34	C9K-PWR-650WACLR/2	650W AC Power Supply	\$868.82	21	\$18,245.22
35	S9500UK9-178	Cisco Catalyst 9500 XE 17.8 UNIVERSAL	\$0.00	21	\$0.00
Total:					\$348,960.36
C9300-48UN-EDU					
36	C9300-48UN-EDU	Catalyst 9300 48-port 5Gbps, K12	\$5,175.12	4	\$20,700.48
37	SC9300UK9-177	Cisco Catalyst 9300 XE 17.7 UNIVERSAL UNIVERSAL	\$0.00	4	\$0.00
38	PWR-C1-1100WAC-P	1100W AC 80+ platinum Config 1 Power Supply	\$0.00	4	\$0.00
39	PWR-C1-1100WAC-P/2	1100W AC 80+ platinum Config 1 Secondary Power Supply	\$786.62	4	\$3,146.48
40	CAB-TA-NA	North America AC Type A Power Cable	\$0.00	8	\$0.00
41	C9300-SSD-NONE	No SSD Card Selected	\$0.00	4	\$0.00
42	STACK-T1-50CM	50CM Type 1 Stacking Cable	\$41.40	4	\$165.60
43	CAB-SPWR-30CM	Catalyst Stack Power Cable 30 CM	\$39.33	4	\$157.32
44	C9300-NM-2Q	Catalyst 9300 2 x 40GE Network Module	\$1,055.73	4	\$4,222.92
45	NETWORK-PNP-LIC	Network Plug-n-Play Connect for zero-touch device deployment	\$0.00	4	\$0.00
46	C9300-NW-A-48	C9300 Network Advantage, 48-port license	\$0.00	4	\$0.00
47	TE-C9K-SW	TE agent for IOSXE on C9K	\$0.00	4	\$0.00
48	C9300-DNA-A-48	C9300 DNA Advantage, 48-Port Term Licenses	\$0.00	4	\$0.00
49	C9300-DNA-A-48-3Y	C9300 DNA Advantage, 48-Port, 3 Year Term License	\$1,783.79	4	\$7,135.16
50	PI-LFAS-T	Prime Infrastructure Lifecycle & Assurance Term - Smart Lic	\$0.00	4	\$0.00

51	PI-LFAS-AP-T-3Y	PI Dev Lic for Lifecycle & Assurance Term 3Y	\$0.00	4	\$0.00
52	D-DNAS-EXT-S-T	Cisco DNA Spaces Extend Term License for Catalyst Switches	\$0.00	4	\$0.00
53	D-DNAS-EXT-S-3Y	Cisco DNA Spaces Extend for Catalyst Switching - 3Year	\$0.00	4	\$0.00
54	TE-EMBEDDED-T	Cisco ThousandEyes Enterprise Agent IBN Embedded	\$0.00	4	\$0.00
55	TE-EMBEDDED-T-3Y	ThousandEyes - Enterprise Agents	\$0.00	4	\$0.00
Total:					\$35,527.96
DN2-HW-APL					
56	DN2-HW-APL	Cisco DNA Center Appliance (Gen 2) - 44 Core	\$37,853.84	1	\$37,853.84
57	CON-L1NBD-DN2HWPL	CX LEVEL 1 8X5XNBD Cisco DNA Center Appliance (Gen 2) - 44 C	\$3,738.89	1 for 12 mo(s)	\$3,738.89
58	CAB-9K12A-NA	Power Cord, 125VAC 13A NEMA 5-15 Plug, North America	\$0.00	2	\$0.00
59	DN2-PCIE-ID10GF	Intel X710-DA2 dual-port 10G SFP+ NIC	\$0.00	1	\$0.00
60	DN2-SD-64G-S	64GB SD Card for UCS Servers	\$0.00	1	\$0.00
61	DN2-PSU1-770W	Cisco UCS 770W AC Power Supply for Rack Server	\$0.00	2	\$0.00
62	DN2-TPM2-002	Trusted Platform Module 2.0 for UCS servers	\$0.00	1	\$0.00
63	DN2-RAID-M5	Cisco 12G Modular RAID controller with 2GB cache	\$0.00	1	\$0.00
64	DN2-MSTOR-SD	Mini Storage Carrier for SD (holds up to 2)	\$0.00	1	\$0.00
65	DN2-PCIE-IQ10GF	Intel X710 quad-port 10G SFP+ NIC	\$0.00	1	\$0.00
66	DN2-SD480G611X-EV	480GB 2.5 inch Enterprise Value 6G SATA SSD	\$0.00	2	\$0.00
67	DN2-CPU-I6238	Intel 6238 2.1GHz/140W 22C/30.25MB DCP DDR4 2933 MHz	\$0.00	2	\$0.00
68	SFP-10G-SR-S	10GBASE-SR SFP Module, Enterprise-Class	\$292.73	2	\$585.46
69	DN2-HW-APL-LIC	DNAC Appliance License - 44 Core	\$0.00	1	\$0.00
70	DNA-SW-2.3.3	Cisco DNA Center SW 2.3.3	\$0.00	1	\$0.00
71	DN2-SD19T6S1X-EV	1.9TB 2.5 inch Enterprise Value 6G SATA SSD	\$0.00	8	\$0.00
72	DN2-MR-X32G2RW	32GB RDIMM DRx4 3200 (8Gb)	\$0.00	8	\$0.00
Total:					\$42,178.19
FPR3100-FTD-HA-BUN					
73	FPR3100-FTD-HA-BUN	Cisco Secure Firewall 3K Threat Defense Chss, Subs HA Bundle	\$0.00	1	\$0.00
74	FPR3110-NGFW-K9	Cisco Secure Firewall 3110 NGFW Appliance, 1U	\$15,828.75	2	\$31,657.50
75	CON-SNT-FPR3110N	SNTC-8X5XNBD Cisco Secure Firewall 3110 NGFW Applianc	\$2,253.24	2 for 36 mo(s)	\$13,519.44
76	FPR3K-PWR-AC-400	Cisco Secure Firewall 3K Series 400W AC Power Supply	\$0.00	2	\$0.00
77	FPR3K-PWR-AC-400	Cisco Secure Firewall 3K Series 400W AC Power Supply	\$1,035.02	2	\$2,070.04
78	CAB-AC	AC Power Cord (North America), C13, NEMA 5-15P, 2.1m	\$0.00	4	\$0.00
79	SF-F3K-TD7.1.0-K9	Cisco Secure Firewall TD 7.1.0 SW for 3100 series appliances	\$0.00	2	\$0.00

80	FPR3K-SSD900	Cisco Secure Firewall 3K Series 900GB	\$0.00	2	\$0.00
81	FPR3K-SLIDE-RAILS	Cisco Secure Firewall 3100 Slide Rail Kit	\$0.00	2	\$0.00
82	FPR3110-BSE	Cisco Secure Firewall 3110 Base Lic	\$0.00	2	\$0.00
83	FPR3K-FAN	Cisco Secure Firewall 3K Series Fan Tray	\$0.00	4	\$0.00
84	FPR3K-SSD-BLANK	Cisco Secure Firewall 3100 Series SSD Blank Slot Cover	\$0.00	2	\$0.00
85	FPR3K-NM-BLANK	Cisco Secure Firewall 3100 Network Module Blank Slot Cover	\$0.00	2	\$0.00
86	L-FPR3110T-T=	Cisco Secure Firewall 3110 Threat Defence License	\$0.00	2	\$0.00
87	L-FPR3110T-T-3Y	Cisco Secure Firewall 3110 Threat Defence 3Y Subs	\$6,349.59	2	\$12,699.18
Total:					\$59,946.16
FPR3100-FTD-HA-BUN					
88	FPR3100-FTD-HA-BUN	Cisco Secure Firewall 3K Threat Defense Chss, Subs HA Bundle	\$0.00	1	\$0.00
89	FPR3110-NGFW-K9	Cisco Secure Firewall 3110 NGFW Appliance, 1U	\$15,828.75	2	\$31,657.50
90	CON-SNT-FPR3110N	SNTC-8X5XNBD Cisco Secure Firewall 3110 NGFW Appliance	\$2,253.24	2 for 36 mo(s)	\$13,519.44
91	FPR3K-PWR-AC-400	Cisco Secure Firewall 3K Series 400W AC Power Supply	\$0.00	2	\$0.00
92	FPR3K-PWR-AC-400	Cisco Secure Firewall 3K Series 400W AC Power Supply	\$1,035.02	2	\$2,070.04
93	CAB-AC	AC Power Cord (North America), C13, NEMA 5-15P, 2.1m	\$0.00	4	\$0.00
94	SF-F3K-TD7.1.0-K9	Cisco Secure Firewall TD 7.1.0 SW for 3100 series appliances	\$0.00	2	\$0.00
95	FPR3K-SSD900	Cisco Secure Firewall 3K Series 900GB	\$0.00	2	\$0.00
96	FPR3K-SLIDE-RAILS	Cisco Secure Firewall 3100 Slide Rail Kit	\$0.00	2	\$0.00
97	FPR3110-BSE	Cisco Secure Firewall 3110 Base Lic	\$0.00	2	\$0.00
98	FPR3K-FAN	Cisco Secure Firewall 3K Series Fan Tray	\$0.00	4	\$0.00
99	FPR3K-SSD-BLANK	Cisco Secure Firewall 3100 Series SSD Blank Slot Cover	\$0.00	2	\$0.00
100	FPR3K-NM-BLANK	Cisco Secure Firewall 3100 Network Module Blank Slot Cover	\$0.00	2	\$0.00
101	L-FPR3110T-T=	Cisco Secure Firewall 3110 Threat Defence License	\$0.00	2	\$0.00
102	L-FPR3110T-T-3Y	Cisco Secure Firewall 3110 Threat Defence 3Y Subs	\$6,349.59	2	\$12,699.18
Total:					\$59,946.16
SF-FMC-VMW-2-K9					
103	SF-FMC-VMW-2-K9	Cisco Firepower Management Center, (VMWare) for 2 devices	\$208.65	2	\$417.30
104	CON-ECMUS-SFMMCVWK	SOLN SUPP SWSS Cisco Firepower Management Center, (VMWa	\$85.76	2 for 12 mo(s)	\$171.52
Total:					\$588.82
Total (Cisco):					\$722,929.09
SFPs					
105	QSFP-40G-ER4-A	40GBase QSFP ER4 LC, 40 Km, Four 10Gbps CWDM wavelengths: 1271 nm, 1291 nm, 1311 nm and 1331 nm QSFP+ transceiver. 100% Cisco compatible.	\$1,218.75	28	\$34,125.00

106	QSFP-40G-LR4-S-A	40GBase QSFP LR4 LC, 10 Km, Four 10Gbps CWDM wavelengths: 1271 nm, 1291 nm, 1311 nm and 1331 nm QSFP+ transceiver. 100% Cisco compatible.	\$312.50	34	\$10,625.00
107	QSFP-40G-SR4-S-A	QSFP+ 40GBase SR4 MPO, Multi-mode Fiber (MMF) 850 nm, 100 meters (328 feet), DOM, Commercial Temperature 100% Cisco compatible.	\$81.25	64	\$5,200.00
108	GLC-TE-A	Approved GLCT 1000Base T RJ45, 100 meters, Copper transceiver. 100% Cisco compatible.	\$31.25	10	\$312.50
109	SFP-10G-SR-S-A	10GBase SR, 300 meters, 850 nm SFP+ transceiver. 100% Cisco compatible.	\$25.00	10	\$250.00
Total (SFPs):					\$50,512.50

Sub Total:		\$773,441.59
Grand Total:		\$773,441.59

Quote valid for 30 days. Payment of invoices are due within 30 days from date of invoice unless other terms are issued. Late payments are subject to interest charges of the lesser of 1½% per month or the maximum amount allowed by law. All prices subject to change without notice. Supply subject to availability. This Quote is subject to Presidio's Standard Terms and Conditions below. Any changes to the following Terms and Conditions must be accepted in writing by Presidio, otherwise, CLIENT agrees to be bound by the following Terms and Conditions and pricing contained herein:

Pricing

- Quoted prices exclude applicable taxes. Invoicing will include applicable taxes unless a valid tax exempt certificate is provided.
- The price included herein reflects a 3% discount for payment by cash, check or wire transfer. This discount will not apply in the event that CLIENT pays using a credit card or debit card.
- Prices exclude freight, handling or insurance (unless itemized in the quote).
- Pricing for Professional Services are best-effort estimates only. Actual pricing will be finalized as part of a mutually-agreeable Statement of Work.

Invoicing

- CLIENT is invoiced for hardware ("goods") upon shipment from the manufacturer and shall accept and pay for partial shipments. Software is invoiced upon shipment of media or when download capability is provided. OEM services are billed per the OEM SOW. Presidio services are billed per the Presidio SOW.
- Usage-Based Services Terms and Conditions. For Usage-Based Services purchased by CLIENT, Presidio shall invoice CLIENT once a month. Notwithstanding the amounts included on the applicable purchase order, the invoice for Usage-Based Services will vary from month to month based upon CLIENT's usage and CLIENT shall be obligated to pay all charges for the Usage-Based Services used by CLIENT in the previous month. If CLIENT is delinquent in its payment obligations for the Usage-Based Services, then, upon reasonable, prior notice, Presidio reserves the right to suspend or discontinue such services at its sole discretion. CLIENT acknowledges and agrees that such discontinuation or suspension by PRESIDIO will not constitute a breach of PRESIDIO'S obligations to CLIENT. CLIENT agrees to indemnify and hold harmless PRESIDIO for any resulting damages due to the suspension or discontinuation of the Usage-Based Services due to CLIENT's delinquent or non-payment.
- Enterprise Software, Licensing and Subscription Services ("Enterprise Agreement"). For Third-Party-provided, enterprise-based software licensing and services, Presidio shall invoice CLIENT according to the terms of the Enterprise Agreement between CLIENT and the Third Party. If CLIENT is delinquent in its payment obligations hereunder, then, upon reasonable, prior notice, Presidio reserves the right to suspend or discontinue such services at its sole discretion. CLIENT acknowledges and agrees that such discontinuation or suspension by PRESIDIO will not constitute a breach of PRESIDIO'S obligations to CLIENT. CLIENT agrees to indemnify and hold harmless PRESIDIO for any resulting damages due to the suspension or discontinuation of the services due to CLIENT's delinquent or non-payment.

Freight, Handling, Shipping

- CLIENT will be billed for Presidio's and/or the manufacturer's freight charges for shipment of goods.
- Title/Risk of loss passes to CLIENT Freight on Board (FOB) origin unless otherwise agreed to in writing by Presidio. Orders shipped from a manufacturer to Presidio at CLIENT request for warehousing, configuration, storage or otherwise, shall be deemed to have been shipped to CLIENT.
- Presidio accepts no responsibility / liability in connection with the shipment.
- Goods held in a Presidio warehouse either a) at the CLIENT's request or b) in the event CLIENT refuses to accept delivery, may be subject to warehousing fees. Client may be asked to execute a Presidio "Warehousing Agreement". CLIENT must provide primary insurance coverage for CLIENT equipment held in a Presidio warehouse.
- International delivery services include (i) Consolidated billing in USD for all international deliveries (ii) Consolidated contracting with one entity, namely Presidio (iii) Single point of contact (iv) Freight forwarding including exportation permits, application of tariff headings, customs clearance (including import permits, licenses, certificates) (v) Asset Management, Tracking & Reporting.

Warranty and Limitation of Liability

- Product is warranted by the Manufacturer, not by Presidio. Please consult Manufacturer for warranty terms. IN NO EVENT SHALL PRESIDIO BE LIABLE TO CLIENT FOR ANY INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL, EXEMPLARY, OR PUNITIVE DAMAGES OF ANY KIND WHATSOEVER, ARISING IN CONTRACT, TORT OR OTHERWISE, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES. PRESIDIO'S ENTIRE LIABILITY AND CLIENT'S EXCLUSIVE REMEDY FOR DAMAGES FROM ANY CAUSE WHATSOEVER, INCLUDING, BUT NOT LIMITED TO, NONPERFORMANCE OR MISREPRESENTATION, AND REGARDLESS OF THE FORM OF ACTIONS, SHALL BE LIMITED TO THE AMOUNT WHICH HAS BEEN ACTUALLY PAID TO PRESIDIO BY CLIENT FOR PRODUCTS HEREUNDER.

Return Policy

- CLIENTS return rights are subject to the return policies (& fees including restocking) of the applicable manufacturer
- A Presidio-issued Return Material Authorization (RMA) is required & needs to accompany returned items before any credit is issued to a CLIENT. Presidio reserves the right to deny RMA requests in the event the Manufacturer will not provide for an authorized return. If integration of product is performed at a Presidio facility, transfer of ownership occurs as of inception of integration regardless of shipment terms as manufacturers will not accept return of open product.
- CLIENTS have 15 calendar days from original ship date to request a RMA (unless shorter period is required by manufacturer)
- Items returned must be in original shipping cartons, unopened, unused, undamaged and unaltered failing which Presidio is entitled to reject acceptance of items or charge further fees
- The CLIENT is responsible for shipping fees to the destination highlighted in the RMA
- Opened software cannot be returned

Cancellation Policy

- CLIENT's cancellation of purchase order rights are subject to the cancellation policies (& fees) of the applicable manufacturer

Leases

- In the event Presidio does not receive payment for leased goods purchased on the CLIENT's behalf from the applicable third-party financing entity, CLIENT is obligated to pay Presidio for all such goods as indicated in the applicable Presidio invoice.

Software terms

- Software is subject to the license terms that accompany it.
- License terms are established between the CLIENT & owner of the software
- Unless Presidio is the owner or licensor, Presidio makes no representations and/or warranties relating to its operation, ownership or use.
- Delivery of software licenses are agreed to be accepted in electronic form from the third party software company. Otherwise, you agree to self-accrue any applicable sales tax at the rate in effect for the jurisdiction.

Term and Termination of Orders: Usage-Based Services, Enterprise Agreements and Multi-Year Orders

- The terms of use for Usage-Based Services (i.e. Cisco-provided WebEx or Software as a Service (SaaS)) are established by the applicable third-party provider of such services either at the applicable third-party provider website or via the separate agreement between CLIENT and third-party provider.
- The "Initial Term" of an order for Usage-Based Services and/or Enterprise Agreement ("Order") starts on the date the Usage-Based Services and/or Enterprise Agreement are available for use by CLIENT and lasts for the time period stated in the Order. After the Initial Term, unless prohibited by applicable law, there will be an automatic "Renewal Term" of the same length of time unless CLIENT notifies Presidio in writing that CLIENT does not want to renew at least sixty (60) days before the end of the then current Initial Term or Renewal Term. If the fees will change for the Renewal Term, Presidio will notify CLIENT reasonably in advance of the Renewal and in time for CLIENT to accept or reject renewing the Usage-Based Services and/or Enterprise Agreement. If CLIENT agrees with the fee changes, CLIENT may do nothing and the new fees will apply for the upcoming Renewal Term.
- Either party may terminate an Order by providing the other party written notice of termination at least sixty (60) days before the end of such Initial or Renewal Term. The termination will be effective on the last day of the Initial or Renewal Term and CLIENT will pay for the Usage-Based Services and/or Enterprise Agreement until the end of the current Initial or Renewal Term regardless of when CLIENT provided notice. Notwithstanding the foregoing, Usage-Based Services and Enterprise Agreements ordered are strictly non-cancelable during the Initial Term or Renewal Term except as otherwise provided in the applicable Service Terms and/or otherwise agreed upon in writing by Presidio. CLIENT will not be entitled to any refund for terminated Usage-Based Services or Enterprise Agreements during the Initial Term or Renewal Term except as agreed upon in writing by Provider and/or Presidio

Multi-Year Agreements

- For multi-year agreements, CLIENT expressly agrees to enter into a binding, non-cancelable agreement per the billing schedule set forth in the quote. THE CLIENT ACKNOWLEDGES AND AGREES THAT THE CLIENT'S AGREEMENT AND PAYMENTS FOR A MULTI-YEAR TRANSACTION ARE ESSENTIAL ELEMENTS OF THE BASIS OF THE BARGAIN BETWEEN THE PARTIES FOR MULTI-YEAR AGREEMENTS, SUCH THAT PRESIDIO WOULD NOT HAVE ENTERED INTO A MULTI-YEAR TRANSACTION WITHOUT SUCH AGREEMENT.

SmartNet (Third party Maintenance)

- CLIENTS rights are subject to the terms provided by the applicable manufacturer. (per website address)
- Delivery of software maintenance, including upgrades and updates are agreed to be accepted electronically. Otherwise, you agree to self-accrue applicable sales tax.

Confidential Information.

- CLIENT agrees that this quote is Presidio Confidential Information. CLIENT shall not disclose this quote to any third party for any purpose. CLIENT agrees to protect this Quote to the same extent that it protects its own Confidential Information, but with no less than a reasonable degree of care.

Export Law Compliance.

- CLIENT has been advised that any hardware or software provided to CLIENT via this Quote and/or subsequent purchase order may be subject to the U.S. Export Administration Regulations. CLIENT agrees to comply with all applicable United States export control laws, and regulations, as from time to time amended, including without limitation, the laws and regulations administered by the United States Department of Commerce and the United States Department of State.

Miscellaneous Terms

- Preprinted terms appearing on CLIENT Purchase Orders must be accepted in writing by Presidio to be applicable. Presidio's performance of such purchase order shall not constitute Presidio's acceptance of new or different terms, including pre-printed terms on such order. In absence of a purchase order, CLIENT agrees that its signature below grants Presidio the right to invoice CLIENT and authorizes payment to Presidio for the amounts owed.

Customer hereby authorizes and agrees to make timely payment for products delivered and services rendered, including payments for partial shipments

Customer Signature

Date

Sample Mini-Bid Cover E-mail to Vendors

TO: Vendors
BCC: Doug Cofer – dcofer@ortn.edu
Jeremy Russell – jlrussell@ortn.edu

Dear Vendors:

The Oak Ridge City School District will be applying for Category 2 E-rate funding for Funding Year 2023 using the Tennessee Education Broadband Consortium Statewide Master Contract(s). In accordance with E-rate rules that all equivalent product lines must be provided the opportunity to submit proposals, we are hereby conducting an E-rate Mini-Bid. Attached to this message is a list of the equipment and services (or their functional equivalent) for which we are seeking proposals. This mini-bid specifically seeks proposals for switches, firewall, network gear, transceivers, and installation and configuration of all components. Our preferred manufacturer product line is Cisco.

Proposals are required to be submitted via sealed bid. Vendors are required to submit two (2) copies or the bids to the address below no later than **Wednesday, January 18, 2023 at 2:00 pm.**

Mary Ann Riley – Purchasing Specialist
E-Rate – Switches, Firewalls, Network Gear, Transceivers and Installation
Oak Ridge Schools
304 New York Ave
Oak Ridge, TN 37830

All equipment and technical questions must be submitted via e-mail by **Friday, January 13, 2022 at 3:00** to Jeremy Russell at jlrussell@ortn.edu with a copy to Beth McConnell at bmccConnell@csMcentral.com

All E-rate questions must be submitted via e-mail to Susan Dundore at swdundore@ortn.edu

The district will host a voluntary job walk **January 10, 2023 at 10am** EST at:

Oak Ridge Schools Technology Dept.
127 Providence Rd, Suite 100
Oak Ridge, TN 37830
(Located in the back of Oak Ridge High School in the portables)

Proposals must be submitted in the attached Excel format, citing the proposer's information at the top of each page. By submitting a TEBC Mini-Bid proposal, vendors are agreeing to the following statements/conditions:

- The quantities shown on the attachment are estimates. The Customer reserves the right to increase or decrease quantities as is needed to meet District needs.

- The equipment is itemized by E-rate Category. We prefer to award to a single vendor for all of the equipment listed in a single Category.
- Vendors must have a valid E-rate SPIN number and must submit it with the proposal.
- Although a specific manufacturer's equipment may be listed on the attachment, the Customer will consider and evaluate proposals for equipment manufactured by other companies that is equivalent in quality and functionality. Such "equivalent" manufacturer proposals must add two new columns to the right of the specific equipment name, showing alternative equipment manufacturer, and model number. Equivalent manufacturers also must include in their proposal manufacturer proof such as manufacturer's specifications or other similar documentation that the equipment is equivalent in quality and functionality.
- Proposals are to include all costs including equipment as requested, installation, shipping costs, delivery, taxes, fees, etc. The District will not be liable for any costs beyond those proposed herein. Incomplete bids will be graded as such.
- Vendors must agree to provide discounted billing to the District, whereby the vendor submits a Form 474 invoice to USAC to seek reimbursement for the discounted share of the eligible costs.
- Winning bidder will be required to submit the final equipment list on the USAC provided Bulk Upload template within two weeks after receiving a signed contract.
- If Vendor installation is requested, Vendor will label all equipment with Funding Request Number (FRN) provided by the school district.
- Vendor shall maintain copies of all proposals, correspondence, receipts, purchase orders, delivery information, memoranda and other data relating to Vendor's equipment and services related to this procurement. All such records shall be retained for 10 years following completion of services and/or installation of equipment and shall be subject to inspection and audit by the District.
- In addition to the foregoing, the winning vendor must maintain and enforce an internal E-rate audit process that ensures that vendor complies with all E-rate program rules and regulations. This process must include the following:
 - Where labor is involved, maintaining detailed, signed individual timesheets
 - Ensuring that ineligible charges are not submitted to USAC
 - Ensuring that services or products are not provided to the Customer without the Customer's express written permission or official purchase authorization
 - Ensuring that all substituted products are Customer-approved prior to ordering
 - Documenting that E-rate funded equipment/services were provided within the E-rate funding year
 - Charging USAC for proper FRN(s)
 - Ensuring that invoices are submitted to the Customer in a timely manner
 - Maintaining fixed asset list of E-rate-supported equipment provided to the Customer with detailed information for each item (model number, serial number, product description) and made available to the Customer in electronic format upon project completion.

Thank you in advance for your proposal.

Doug Cofer
 Technology Director
 Oak Ridge Schools

865-425-9093
dcofer@ortn.edu

Internal Connections

Proposal Submitted By: _____
 Company Name: _____
 Company SPIN (498 ID): _____
 Contact Name: _____
 Contact E-mail: _____
 Contract Phone: _____
 TEBC Schedule/Contract: _____

[optional]		To be completed by school		To be completed by vendor		line quotes (different than Column C)	
District	Category	Manufacturer Name	Description [optional]	Model Number	Quantity	Price/Unit (quantity * unit)	Equivalent Make
District	Switches	Cisco	Cisco Catalyst 9600 Series 6 Slot Chassis, EDU Offering	C9606R-EDU	2		
District	Switches	Cisco	Cisco Catalyst 9600 Series Supervisor 1 Module	C9600-SUP-1	2		
District	Switches	Cisco	Cisco Catalyst 9600 Series 240GB SSD Storage	C9600-SUP-12	4		
District	Switches	Cisco	Cisco Catalyst 9600 Series Redundant Supervisor 1 Module	C9600-SUP-12	2		
District	Switches	Cisco	Cisco Catalyst 9600 Series 24-Port 40GbE/12-Port 100GbE	C9600-LC-24C	4		
District	Switches	Cisco	Cisco Catalyst 9600 Series 48-Port 25GbE/10GbE/10G	C9600-LC-48YL	2		
District	Switches	Cisco	Cisco Catalyst 9600 Series 2000W AC Power Supply	C9600-PWR-2KWAC	6		
District	Switches	Cisco	Cisco Catalyst 9600 DNA Advantage 3 Year License	C9600-DNA-A-3Y	2		
District	Switches	Cisco	Catalyst 9500 48-port x 17/10/25G and 4-port 40/100G, EDU	C9800-48Y4C-EDU	21		
District	Switches	Cisco	650W AC Power Supply	C9K-PWR-650WACL/R2	21		
District	Switches	Cisco	Cisco Catalyst 9500 DNA Advantage 3 Year License	C9500-DNA-A-3Y	21		
District	Switches	Cisco	C9500 DNA Essential 3 Year License	C9500-DNA-E-3Y	21		
District	Switches	Cisco	Catalyst 9300 48-port 5Gbps, K12	C9300-48UN-EDU	4		
District	Switches	Cisco	1100W AC 80+ platinum Config 1 Secondary Power Supply	PWR-C1-1100WAC-PZ	4		
District	Switches	Cisco	50CM Type 1 Strapping Cable	STACK-T1-50CM	4		
District	Switches	Cisco	Catalyst Stack Power Cable 90 CM	CAB-SPWR-30CM	4		
District	Switches	Cisco	Catalyst 9300 2 x 40GE Network Module	C9300-NM-2Q	4		
District	Switches	Cisco	C9300 DNA Advantage, 48-Port, 3 Year Term License	C9300-DNA-A-48-3Y	4		
District	Switches	Cisco	C9300 DNA Essentials, 48-port-3 Year Term License	C9300-DNA-E-48-3Y	4		
District	Network	Cisco	Cisco DNA Center Appliance (Gen 2) - 44 Core	DNS-HW-APL	1		
District	Network	Cisco	CX LEVEL 1 8XSXNBD Cisco DNA Center Appliance (Gen 2) - 44 C	CON-L1NBD-DN2HWPL	1		
District	Network	Cisco	10GBASE-SR SFP Module, Enterprise-Class	SFP-10G-SR-S	2		
District	Firewall	Cisco	Cisco Secure Firewall 3110 NGRW Appliance, 1U	FPF3110-NGFW-HK3	4		
District	Firewall	Cisco	SNTC-8XSXNBD Cisco Secure Firewall 3110 NGRW Appliance	CON-SNT-PPR3110N	4		
District	Firewall	Cisco	Cisco Secure Firewall 3K Series 400W AC Power Supply	FPF3K-PWR-AC-400	4		
District	Firewall	Cisco	Cisco Secure Firewall 3110 Threat Defense 3Y Subs	L-PPR3110T-T-3Y	4		
District	Firewall	Cisco	Cisco Firepower Management Center, (VMMWare) for 2 devices	SF-FMC-VMMW-2-K9	2		
District	Firewall	Cisco	SOLN SLUPP SWSS Cisco Firepower Management Center, (VMMWa	CON-ECMUS-SFMMGWK	2		
District	Optics	Cisco or FS or Generic	QSFP-40G-ER4*	QSFP-40GBASE-ER4-Transceiver Module, LC, 40KM	28		
District	Optics	Cisco or FS or Generic	QSFP-40G-LR4-S*	QSFP-40GBASE-LR4-Trans Mod, LC, 10km, Enterprise-Class	34		
District	Optics	Cisco or FS or Generic	QSFP-40G-SR4-S*	40GBASE-SR4 QSFP Transcvr Module, MPO Conn, Enterprise-Class	64		
District	Optics	Cisco or FS or Generic	GLC-TE*	100GBASE-T SFP transceiver module for Category 5 copper wire	10		
District	Optics	Cisco or FS or Generic	SFP-10G-SR-S*	10GBASE-SR SFP Module, Enterprise-Class	10		
District	Labor	None	Labor, Installation	Labor, Installation	1		
District	Labor	None	Setup and configuration	Setup and configuration	1		

Signature Below Accepts the Following:
Term of Service: April 1, 2021 - June 30, 2026
 Purchase IS contingent upon E-Rate funding approval
 Purchase IS NOT contingent upon E-Rate funding approval
 Order may be cancelled if E-Rate and/or local budget approval is not secured

Accepted By (Signature) _____
 Print Name _____
 Title _____
 DATE _____

*By submitting a quote in response to the Customer's request, and if selected, the Service Provider agrees to abide the Terms and Conditions of the referenced SMC and proceed with the project accordingly subject to coordination with the Customer.



Oak Ridge Schools
TEACHING AND LEARNING

MEMORANDUM

Dr. Kelly Williams

Executive Director, Office of Teaching and Learning

TO: Board of Education

DATE: 2/22/23

SUBJECT: Item for Action: Copier Lease and Service Agreements

I recommend the approval of the copier lease and from Centriworks in the annual amount of \$71,731.08 which is dependent on lease rates. This is a 12-month agreement renewable for up to five years. This lease will update all district copiers. Funding for lease and service comes from 141-72210-330-300. The service agreement cost is calculated on print counts and has historically been approximately \$79,000 annually.



Technology Department

127 Providence Road, Suite 100, Oak Ridge, TN 37830

Phone (865) 425-9015 Fax: (865) 425-9062 Email: technology@ortn.edu

February 13, 2023

To: Kelly Williams

From: Doug Cofer, Director of Technology

Subject: District Copier Lease and Service Agreement Approval

I am recommending the approval of the copier lease from Centriworks in the annual amount of \$71,731.08, which is dependent on lease rates. This is a 12-month agreement renewable for up to 5 years. This lease will be updating all the copiers.

I am also recommending the approval of the Service Agreement for servicing and supplying the copiers on the new lease. Cost is calculated on print counts, so amounts will vary, but in the past have cost approximately \$79,000 yearly. This is reviewed and renewed annually and is separate from the lease agreement.

Funding for copier lease and servicing comes from accounts: 141-72210-330-000-00000-300 for the lease and 141-72210-330-000-00000-300 for the Service Agreement.

Purchasing requirements were met through Omnia Partners, contract number 2021002788, and RFP 00811-FEB20204. Please see attached, Lease Agreement, Service Agreement, and Executive Summary. More information can be viewed at: <https://www.omniapartners.com/publicsector/suppliers/ricoh/contract-documentation>.

APPLICATION NO.

AGREEMENT NO.

Lease With Maintenance Agreement

3505 Sutherland Avenue • Knoxville, TN 37919 • Phone: 865.524.1124 • Fax: 865.522.6660

The words Lessee, you and your refer to Customer. The words Lessor, we, us and our refer to Centriworks Financial, LLC.

CUSTOMER INFORMATION

Form with fields for FULL LEGAL NAME, STREET ADDRESS, CITY, STATE, ZIP, PHONE, FAX, BILLING NAME, BILLING STREET ADDRESS, CITY, STATE, ZIP, E-MAIL, and EQUIPMENT LOCATION.

VENDOR (VENDOR IS NOT OUR AGENT AND IS NOT AUTHORIZED BY US TO ACT ON OUR BEHALF OR TO WAIVE OR ALTER ANY PROVISION OF THIS AGREEMENT) Centriworks Knoxville, TN

EQUIPMENT DESCRIPTION

Table with columns: MAKE, SERIAL NO., STARTING METER. Includes a checkbox for 'See the attached Schedule A'.

TERM AND PAYMENT SCHEDULE

Table with columns: 60, Payments* of \$5,977.59, The lease contract payment ("Payment") period is monthly unless otherwise indicated, *plus applicable taxes. Rows include Payment includes 0 B&W Images per month, 0 Color Images per month, and Scans per month.

By initialing here, you agree that service and supplies are not included in this Agreement.

END OF LEASE OPTIONS

You will have the following option at the end of the original term, provided that no event of default under the Agreement has occurred and is continuing. To the extent that any purchase option indicates that the purchase price will be the "Fair Market Value" (or "FMV"), such term means the value of the Equipment in continued use. 1) Purchase all but not less than all the Equipment for the Fair Market Value per paragraph 1, 2) Renew the Agreement per paragraph 1, or 3) Return the Equipment per paragraph 3.

THIS IS A NONCANCELABLE / IRREVOCABLE AGREEMENT; THIS AGREEMENT CANNOT BE CANCELED OR TERMINATED.

LESSOR ACCEPTANCE

Signature line for Centriworks Financial, LLC with fields for SIGNATURE, TITLE, and DATED.

CUSTOMER ACCEPTANCE

By signing below, you certify that you have reviewed and do agree to all terms and conditions of this Agreement on this page and on page 2 attached hereto.

Signature line for Oak Ridge City School District with fields for SIGNATURE, TITLE, and DATED. Includes a large 'X' mark.

FEDERAL TAX I.D. #

PRINT NAME

ACCEPTANCE OF DELIVERY

You certify that all the Equipment listed above has been furnished, that delivery and installation has been fully completed and is satisfactory. Upon you signing below, your promises herein will be irrevocable and unconditional in all respects.

Signature line for Oak Ridge City School District with fields for SIGNATURE, TITLE, and DATE OF DELIVERY. Includes a large 'X' mark.

1. **AGREEMENT:** For business purposes only, you agree to lease from us the goods, together with all replacements, parts, repairs, additions, and accessories incorporated therein or attached thereto and any and all proceeds of the foregoing, including, without limitation, insurance recoveries (the "Equipment") and/or to finance certain licensed software and services ("Financed Items", which are included in the word "Equipment" unless separately stated), all as described on page 1 of this Agreement, excluding equipment marked as not financed under this Agreement, as it may be supplemented from time to time. You agree to all of the terms and conditions contained in this Agreement and any supplement, which (with the acceptance certification) is the entire agreement regarding the Equipment ("Agreement") and which supersedes any purchase order or invoice. You authorize us to correct or insert missing Equipment identification information and to make corrections to your proper legal name and address. This Agreement becomes valid upon execution by us. Unless otherwise stated in an addendum hereto, this Agreement will renew for 12-month term(s) unless you send us written notice between 90 and 150 days (before the end of any term) that you want to purchase or return the Equipment and you timely complete such purchase or return. If any provision of this Agreement is declared unenforceable in any jurisdiction, the other provisions herein shall remain in full force and effect in that jurisdiction and all others.

2. **RENT, TAXES AND FEES:** You will pay the monthly Payment (as adjusted) when due, plus any applicable sales, use and property taxes. The base Payment will be adjusted proportionately upward or downward: (1) by up to 10% to accommodate changes in the actual Equipment cost; (2) if the shipping charges or taxes differ from the estimate given to you; and (3) to comply with the tax laws of the state in which the Equipment is located. If we pay any taxes, insurance or other expenses that you owe hereunder, you agree to reimburse us when we request and to pay us a processing fee for each expense or charge we pay on your behalf. We may charge you for any filing fees required by the Uniform Commercial Code (UCC) or other laws, which fees vary state-to-state. By the date the first Payment is due, you agree to pay us an origination fee, as shown on our invoice or addendum, to cover us for all closing costs. We will have the right to apply all sums, received from you, to any amounts due and owed to us under the terms of this Agreement. If for any reason your check is returned for nonpayment, you will pay us a bad check charge of \$30 or, if less, the maximum charge allowed by law. We may make a profit on any fees, estimated tax payments and other charges paid under this Agreement. You cannot pay off this Agreement or return the Equipment prior to the end of the term without our consent. If we consent, we may charge you, in addition to other amounts owed, an early termination fee equal to 5% of the price of the Equipment.

3. **MAINTENANCE AND LOCATION OF EQUIPMENT; SECURITY INTEREST:** At your expense, you agree to keep the Equipment: (1) in good repair, condition and working order, in compliance with applicable manufacturers' and regulatory standards; (2) free and clear of all liens and claims; and (3) only at your address shown on page 1, and you agree not to move it unless we agree. As long as you have given us the written notice as required in paragraph 1 prior to the expiration or termination of this Agreement's term, if you do not purchase the Equipment, you will return all but not less than all of the Equipment and all related manuals and use and maintenance records to a location we specify, at your expense, in retail re-saleable condition, full working order and complete repair. You are solely responsible for removing any data that may reside in the Equipment you return, including but not limited to hard drives, disk drives or any other form of memory. You grant us a security interest in the Equipment to secure all amounts you owe us under any agreement with us, and you authorize us to file a financing statement (UCC-1). You will not change your state of organization, headquarters or residence without providing prior written notice to us so that we may amend or file a new UCC-1. You will notify us within 30 days if your state of organization revokes or terminates your existence.

4. **COLLATERAL PROTECTION; INSURANCE; INDEMNITY; LOSS OR DAMAGE:** You agree to keep the Equipment fully insured against risk and loss, with us as lender's loss payee, in an amount not less than the original cost until this Agreement is terminated. You also agree to obtain a general public liability insurance policy with such coverage and from such insurance carrier as shall be satisfactory to us and to include us as an additional insured on the policy. Your insurance policy(s) will provide for 10 days advance written notice to us of any modification or cancellation. You agree to provide us certificates or other evidence of insurance acceptable to us. If you fail to comply with this requirement within 30 days after the start of this Agreement, we have the option, but not the obligation, to do so as provided in either (A) or (B) as follows, as determined in our discretion: (A) We may secure property loss insurance on the Equipment from a carrier of our choosing in such forms and amounts as we deem reasonable to protect our interests. If we secure insurance on the Equipment, we will not name you as an insured party, your interests may not be fully protected, and you will reimburse us the premium which may be higher than the premium you would pay if you obtained insurance, and which may result in a profit to us through an investment in reinsurance. If you are current in all of your obligations under the Agreement at the time of loss, any insurance proceeds received relating to insurance we obtain pursuant to this subsection (A) will be applied, at our option, to repair or replace the Equipment, or to pay us the remaining payments due or to become due under this Agreement, plus our booked residual, both discounted at 2% per annum. (B) We may charge you a monthly property damage surcharge of up to .0035 of the Equipment cost as a result of our credit risk and administrative and other costs, as would be further described on a letter from us to you. We may make a profit on this program. NOTHING IN THIS PARAGRAPH WILL RELIEVE YOU OF RESPONSIBILITY FOR LIABILITY INSURANCE ON THE EQUIPMENT. We are not responsible for, and you agree to hold us harmless and reimburse us for and to defend on our behalf against, any claim for any loss, expense, liability or injury caused by or in any way related to delivery, installation, possession, ownership, use, condition, inspection, removal, return or storage of the Equipment. You are responsible for the risk of loss or for any destruction of or damage to the Equipment. You agree to promptly notify us in writing of any loss or damage. If the Equipment is destroyed and we have not otherwise agreed in writing, you will pay to us the unpaid balance of this Agreement, including any future rent to the end of the term plus the anticipated purchase price of the Equipment (both discounted at 2%). Any proceeds of insurance will be paid to us and credited, at our option, against any loss or damage. You authorize us to sign on your behalf and appoint us as your attorney-in-fact to endorse in your name any insurance drafts or checks issued due to loss or damage to the Equipment. All indemnities will survive the expiration or termination of this Agreement.

5. **ASSIGNMENT: YOU HAVE NO RIGHT TO SELL, TRANSFER, ASSIGN OR SUBLEASE THE EQUIPMENT OR THIS AGREEMENT, without our prior written consent.** Without our prior written consent, you shall not reorganize or merge with any other entity or transfer all or a substantial part of your ownership interests or assets. We may sell, assign, or transfer this Agreement without notice. You agree that if we sell, assign or transfer this Agreement, our assignee will have the same rights and benefits that we have now and will not have to perform any of our obligations. You agree that the new Lessor will not be subject to any claims, defenses, or offsets that you may have against us. You shall cooperate with us in executing any documentation reasonably required by us or our assignee to effectuate any such assignment. This Agreement shall be binding on and inure to the benefit of the parties hereto and their respective successors and assigns.

6. **DEFAULT AND REMEDIES:** You will be in default if: (a) you do not pay any Payment or other sum due to us or any other person when due or if you fail to perform in accordance with the covenants, terms and conditions of this Agreement or any other agreement with us or any of our affiliates or any material agreement with any other lender, (b) you make or have made any false statement or misrepresentation to us, (c) you or any guarantor dies, dissolves or terminates existence, (d) there has been a material adverse change in your or any guarantor's financial, business or operating condition, or (e) any guarantor defaults under any guaranty for this Agreement. If any part of a Payment is more than 5 days late, you agree to pay a late charge equal to: (1) the greater of 10% of the Payment which is late or \$26.00, or (2) if less, the maximum charge allowed by law. If you are ever in default, at our option, we can terminate this Agreement and require that you pay the unpaid balance of this Agreement, including any future Payments to the end of the term plus the anticipated purchase price of the Equipment (both discounted at 2%). We may recover default interest on any unpaid amount at the rate of 12% per year. Concurrently and cumulatively, we may also use any or all of the remedies available to us under Articles 2A and 9 of the UCC and any other law, including requiring that you: (1) return the Equipment to us to a location we specify; and (2) immediately stop using any Financed Items. In addition, we will have the right, immediately and without notice or other action, to set-off against any of your liabilities to us any money, including depository account balances, owed by us to you, whether or not due. In the event of any dispute or enforcement of rights under this Agreement or any related agreement, you agree to pay our reasonable attorney's fees (including any incurred before or at trial, on appeal or in any other proceeding), actual court costs and any other collection costs, including any collection agency fee. If we have to take possession of the Equipment, you agree to pay the costs of repossession, moving, storage, repair and sale. The net proceeds of the sale of any Equipment will be credited against what you owe us under this Agreement. **YOU AGREE THAT WE WILL NOT BE RESPONSIBLE TO PAY YOU ANY CONSEQUENTIAL, INDIRECT OR INCIDENTAL DAMAGES FOR ANY DEFAULT, ACT OR OMISSION BY ANYONE.** Any delay or failure to enforce our rights under this Agreement will not prevent us from enforcing any rights at a later time. You agree that this Agreement is a "Finance Lease" as defined by Article 2A of the UCC and your rights and remedies are governed exclusively by this Agreement. You waive all rights under sections 2A-508 through 522 of the UCC. If interest is charged or collected in excess of the maximum lawful rate, we will not be subject to any penalties.

7. **INSPECTIONS AND REPORTS:** We will have the right, at any reasonable time, to inspect the Equipment and any documents relating to its use, maintenance and repair. Within 30 days after our request, you will deliver all requested information (including tax returns) which we deem reasonably necessary to determine your current financial condition and faithful performance of the terms hereof. This may include: (i) compiled, reviewed or audited annual financial statements (including, without limitation, a balance sheet, a statement of income, a statement of cash flow, a statement of changes in equity and notes to financial statements) within 120 days after your fiscal year end, and (ii) management-prepared interim financial statements within 45 days after the requested reporting period(s). Annual statements shall set forth the corresponding figures for the prior fiscal year in comparative form, all in reasonable detail without any qualification or exception deemed material by us. Unless otherwise accepted by us, each financial statement submitted to us shall be prepared in accordance with generally accepted accounting principles consistently applied and shall fairly and accurately present your financial condition and results of operations for the period to which it pertains.

8. **FAXED OR SCANNED DOCUMENTS, MISC.:** The parties agree that the original hereof for enforcement and perfection purposes, and the sole "record" constituting "chattel paper" under the UCC, is the paper copy hereof bearing (i) the original or a copy of either your manual signature or an electronically applied indication of your intent to enter into this Agreement, and (ii) our original manual signature. You waive the right to challenge in court the authenticity or binding effect of any faxed or scanned copy or signature thereon. You agree to execute any further documents that we may request to carry out the intents and purposes of this Agreement. All notices shall be mailed or delivered by facsimile transmission or overnight courier to the respective parties at the addresses shown on this Agreement or such other address as a party may provide in writing from time to time. By providing any telephone number, now or in the future, for a cell phone or other wireless device, you are expressly consenting to receiving communications, regardless of their purpose, at that number, including, but not limited to, prerecorded or artificial voice message calls, text messages, and calls made by an automatic dialing system from us and our affiliates and agents. These calls and messages may incur access fees from your provider.

9. **WARRANTY DISCLAIMERS: YOU AGREE THAT YOU HAVE SELECTED EACH ITEM OF EQUIPMENT BASED UPON YOUR OWN JUDGMENT AND YOU DISCLAIM ANY RELIANCE UPON ANY STATEMENTS OR REPRESENTATIONS MADE BY US. YOU AGREE THAT YOU ARE UNCONDITIONALLY OBLIGATED TO MAKE ALL PAYMENTS UNDER THIS AGREEMENT REGARDLESS OF ANY CLAIM OR COMPLAINT AGAINST ANY SUPPLIER, LICENSOR OR MANUFACTURER, AND ANY FAILURE OF A SERVICE PROVIDER TO PROVIDE SERVICES WILL NOT EXCUSE YOUR OBLIGATIONS TO US UNDER THIS AGREEMENT. YOU ARE NOT ENTITLED TO REDUCE OR SET-OFF AGAINST AMOUNTS DUE UNDER THIS AGREEMENT FOR ANY REASON. WE MAKE NO WARRANTIES, EXPRESS OR IMPLIED, OF, AND TAKE ABSOLUTELY NO RESPONSIBILITY FOR, MERCHANTABILITY, FITNESS FOR ANY PARTICULAR PURPOSE, CONDITION, QUALITY, ADEQUACY, TITLE, DATA ACCURACY, SYSTEM INTEGRATION, FUNCTION, DEFECTS, OR ANY OTHER ISSUE IN REGARD TO THE EQUIPMENT, ANY ASSOCIATED SOFTWARE AND ANY FINANCED ITEMS.**

10. **LAW, JURY WAIVER: Agreements, promises and commitments made by Lessor, concerning loans and other credit extensions must be in writing, express consideration and be signed by Lessor to be enforceable.** This Agreement may be modified only by written agreement and not by course of performance. This Agreement will be governed by and construed in accordance with the law of the state of the principal place of business of Lessor or, if assigned, its assignee. You consent to jurisdiction and venue of any state or federal court in the state the Lessor or, if assigned, its assignee has its principal place of business, and waive the defense of inconvenient forum. For any action arising out of or relating to this Agreement or the Equipment, **YOU AND WE WAIVE ALL RIGHTS TO A TRIAL BY JURY.**

11. **METER READINGS, OVERAGES AND COST ADJUSTMENTS:** Your vendor collects Image/Scan meters electronically. If for any reason they are unable to collect meter readings using this method for a period of three (3) months, an additional charge of \$0.003 per image/scan will be billed for the duration of the Agreement, and meters will be estimated based on past usage until a time when your Vendor can confirm actual usage. If you make more than the Included No. of Images/Scans in any month, you will pay an additional amount equal to the number of excess Images/Scans made multiplied by the applicable Overage per image/scan charge. Regardless of the number of images/scans made each month, you will never pay less than the Monthly Payment.

12. **UPGRADE AND DOWNGRADE PROVISION: AFTER COMMENCEMENT OF THE AGREEMENT AND UPON YOUR WRITTEN REQUEST, AT YOUR VENDOR'S SOLE DISCRETION, YOUR VENDOR MAY REVIEW YOUR IMAGE/SCAN VOLUME AND PROPOSE OPTIONS FOR UPGRADING OR DOWNGRADING THE EQUIPMENT TO ACCOMMODATE YOUR BUSINESS NEEDS.**

13. **TRANSITION BILLING:** In order to facilitate an orderly transition, including installation and training, and to provide a uniform billing cycle, the start date of this Agreement (the "Effective Date") will be a date after the certification of acceptance of the Equipment, as shown on the first invoice. The payment for this transition period will be based on the Payment, prorated on a 30-day calendar month, and will be added to your first monthly Payment.

MAINTENANCE AND SUPPLIES AGREEMENT ("MSA") WITH VENDOR, Centriworks ("Centriworks")

Unless otherwise indicated on the face of the Lease with Maintenance Agreement, the charges stated in the foregoing Agreement include amounts actually payable to Centriworks under this MSA for the maintenance (during normal business hours), inspection, adjustment, parts replacement, drums and cleaning material required for the proper operation and toner and developer. Paper must be separately purchased by Customer. If necessary, this MSA may be assigned by Centriworks. Color cost per image rates are predicated on a 20% page coverage rate. Centriworks reserves the right to review color coverage rates and increase the color cost per image a proportional amount at any time during this Agreement if color coverage rates are found to be more than 20%. Other maintenance and supply prices are guaranteed for one (1) year, at the end of which prices may change without prior notification. At the end of the first 12 months after commencement of this Agreement, and once each successive 12-month period thereafter, we may increase the Payment and the Overage per image/scan charge by a maximum of 15% of the existing Payment or Overage per image/scan charge. We may charge you a monthly supply freight fee to cover our costs of shipping supplies to you.

NON-SOLICITATION OF PERSONNEL: Centriworks and Customer each acknowledge and agree that in the course of performing its obligations under this MSA, each party may be introduced to or come to know and work with employees, agents, representatives, vendors, suppliers and sub-contractors of the other and each agrees that the employees, agents, representatives, vendors, suppliers and sub-contractors of the other are valuable resources, in whom each party has invested considerable time, effort and resources. Therefore, each party agrees that for the duration of this MSA and for one (1) year thereafter, neither party shall directly or indirectly solicit, interfere with or, entice away from (whether as an employee, agent, representative, consultant, independent contractor or otherwise) any employee of the other. Any violation of this provision shall result in the party in breach compensating the other within ten (10) business days in the amount of said employee's annual compensation including all benefits.

Initials of Customer: _____

Initials of Centriworks Representative: _____



CENTRIWORKS

a THERMOCOPIY company

Schedule A Equipment Addendum

Qty	Product #	Description	Serial Number	ID#
	409236	Ricoh Pro 8300s		
	409236	Ricoh Pro 8300s		
	409236	Ricoh Pro 8300s		
	418309	Ricoh IM C4500		
	418309	Ricoh IM C4500		
	418300	Ricoh IM C3500		
	418300	Ricoh IM C3500		
	418300	Ricoh IM C3500		
	418300	Ricoh IM C3500		
	418292	Ricoh IM C3000		
	418292	Ricoh IM C3000		
	418292	Ricoh IM C3000		
	418292	Ricoh IM C3000		
	418320	Ricoh IM C6000		
	418284	Ricoh IM C2500		
	418284	Ricoh IM C2500		
	418284	Ricoh IM C2500		
	418284	Ricoh IM C2500		
	418284	Ricoh IM C2500		
	418284	Ricoh IM C2500		
	418775	Ricoh IM 7000		
	418775	Ricoh IM 7000		
	418775	Ricoh IM 7000		
	418775	Ricoh IM 7000		
	418775	Ricoh IM 7000		
	418775	Ricoh IM 7000		
	418775	Ricoh IM 7000		
	418828	Ricoh IM 5000		
	418828	Ricoh IM 5000		
	418819	Ricoh IM 2500		
	418819	Ricoh IM 2500		
	418825	Ricoh IM 3500		
	418825	Ricoh IM 3500		
			Initial	

NON-APPROPRIATION ADDENDUM

This is an addendum ("Addendum") to and part of that certain agreement between Centriworks Financial ("we", "us", "our") and Oak Ridge City School District ("Governmental Entity", "you", "your"), which agreement is identified in our records as agreement number 1843227 ("Agreement"). All capitalized terms used in this Addendum which are not defined herein shall have the meanings given to such terms in the Agreement.

APPLICABLE TO GOVERNMENTAL ENTITIES ONLY

You hereby represent and warrant to us that as of the date of the Agreement: (a) the individual who executed the Agreement had full power and authority to execute the Agreement on your behalf; (b) all required procedures necessary to make the Agreement a legal and binding obligation against you have been followed; (c) the Equipment will be operated and controlled by you and will be used for essential government purposes for the entire term of the Agreement; (d) that all payments due and payable for the current fiscal year are within the current budget and are within an available, unexhausted, and unencumbered appropriation; (e) you intend to pay all amounts payable under the terms of the Agreement when due, if funds are legally available to do so; (f) your obligations to remit amounts under the Agreement constitute a current expense and not a debt under applicable state law; (g) no provision of the Agreement constitutes a pledge of your tax or general revenues; and (h) you will comply with any applicable information reporting requirements of the tax code, which may include 8038-G or 8038-GC Information Returns. If funds are not appropriated to pay amounts due under the Agreement for any future fiscal period, you shall have the right to return the Equipment and terminate the Agreement on the last day of the fiscal period for which funds were available, without penalty or additional expense to you (other than the expense of returning the Equipment to the location designated by us), provided that at least thirty (30) days prior to the start of the fiscal period for which funds were not appropriated, your Chief Executive Officer (or Legal Counsel) delivers to us a certificate (or opinion) certifying that (a) you are a state or a fully constituted political subdivision or agency of the state in which you are located; (b) funds have not been appropriated for the applicable fiscal period to pay amounts due under the Agreement; (c) such non-appropriation did not result from any act or failure to act by you; and (d) you have exhausted all funds legally available for the payment of amounts due under the Agreement. You agree that this paragraph shall only apply if, and to the extent that, state law precludes you from entering into the Agreement if the Agreement constitutes a multi-year unconditional payment obligation.

The undersigned, as a representative of the Governmental Entity, agrees that this Addendum is made a part of the Agreement.

GOVERNMENTAL ENTITY'S AUTHORIZED SIGNATURE			
Oak Ridge City School District	X		
	SIGNATURE	PRINT NAME & TITLE	DATE
OUR SIGNATURE			
Centriworks Financial			
	SIGNATURE	PRINT NAME & TITLE	DATE

Terms and Conditions

EMERGENCY SERVICE shall be provided without additional charge during Centrworks' normal business hours (Monday-Friday, 8:00 a.m. - 5:00 p.m., exceptions are national and Centrworks holidays). Service required outside Centrworks' normal business hours will be charged to the customer at established overtime rates.

PARTS REPLACEMENT: Parts worn or damaged due to normal wear will be replaced at no additional charge.

SUPPLIES: Toners, developer, staples, red stamp ink, fuser and silicone oil are included. Paper must be separately purchased by Customer. Color cost per image rates are predicated on a 20% page coverage rate. Centrworks reserves the right to review color coverage rates and increase the color cost per image a proportional amount at any time during this Agreement if color coverage rates are found to be more than 20%. Other maintenance and supply prices are guaranteed for one (1) year, at the end of which prices may change without prior notification. You agree to pay a monthly supply freight fee to cover the costs of shipping supplies to you.

INSTALLATION REQUIREMENTS: The equipment must be installed according to specific requirements in terms of space, electrical and environmental conditions as defined in the Equipment Operator's Manual. Owner shall ensure that the equipment is placed in an area that conforms to these requirements.

KEY OPERATOR: Customer agrees to make available a Key Operator for training purposes in the use of the equipment and agrees to notify Centrworks of any change in the Key Operator assignment. The Operator's Manual for each equipment model defines specific operator responsibilities. Performances of normal operator functions as described in the Operator's Manual are not included in this agreement and are subject to additional charges.

METER READINGS: Centrworks collects Image/Scan meters electronically. If for any reason we are unable to collect meter readings using this method for a period of three (3) months, an additional charge of \$0.003 per image/scan will be billed for the duration of the Agreement, and meters will be estimated based on past usage until a time when Centrworks can confirm actual usage.

PAYMENTS: Customer agrees to pay the base charge in advance and additional copies/prints/scans (based on 8.5" x 11", 8.5" x 14" copies/prints/scans) in arrears payable upon receipt of invoice and upon failure to do so Centrworks may (i) terminate this agreement, (ii) refuse to service the equipment, support the software, and furnish supplies, and (iii) recover damages as a result thereof and any cost or fees it incurs in enforcing collection. Customer agrees to pay for all work done and parts installed after the expiration of the paid for period of the contract. Parts and labor will be billed and payable at the retail rates then in effect. If total scans are greater than 110% of the metered copies/prints, an additional charge of \$0.002 per scan will occur for the scans in excess of the 110% of the metered copies/prints.

TERMS: This agreement is for the term of contract length (months) specified in this contract and will renew for consecutive twelve (12) month periods. In the event of cancellation of this agreement for any reason, unused supplies shall be the property of Centrworks or the customer may pay for the supplies at the then prevailing retail rates. At the end of the first 12 months after commencement of this Agreement, and once each successive 12-month period thereafter, we may increase the Payment and the Overage per image/scan charge by a maximum of 15% of the existing Payment or Overage per image/scan charge.

LIMITATIONS OF LIABILITY: Electrical work external to the equipment and equipment line cord is not covered by this agreement. Labor, parts and other expenses incurred by Centrworks to service or repair equipment damaged by accident, neglect, misuse, fire, water, act of God, power or telephone facilities or failure thereof are not covered by this agreement and shall be paid for by customer at Centrworks' standard rates for labor, parts and travel. Centrworks makes no warranties expressed, implied or arising by custom or trade usage, and specifically makes no warranty of merchantability or fitness for any particular purpose. In no event shall Centrworks be liable for special, incidental, consequential or tort damages, including, without limitation, any damages resulting from loss of use, loss of data, loss of profits or loss of business, arising out of or in connection with Centrworks' performance of services, whether or not Centrworks has been advised of the possibility of such damages.

GENERAL PROVISIONS: This Agreement and the License Agreement set forth the entire agreement and understanding of the parties with respect to the subject matter hereof, and supersede all prior oral and written agreements and understandings relating thereto. No representation, promise, inducement or statement of intention with respect to the Supported Software has been made by either party, which is not set forth in this Agreement, or the License Agreement and neither shall be bound by or liable for any alleged representation, promise, inducement or statement of intention with respect to the Supported Software not so set forth. No waiver, alteration, modification, or cancellation of any of the provisions of this Agreement shall be binding unless made in writing and signed by the parties. The failure of either party at any time or times to require performance of any provision hereof shall in no manner affect the right at a later time to enforce such provision. No remedy referred to in this Agreement is intended to be exclusive, but each shall be cumulative and in addition to any other remedy referred to herein or otherwise available at law or in equity. Centrworks shall not be liable for any delays in the performance of any of its obligations due to causes beyond its reasonable control, including without limitation, fire, strike, war, riots, acts of any civil or military authority, acts of God, judicial action, unavailability or shortages of labor, materials or equipment, failure or delays in delivery of Centrworks' vendors and suppliers or delays in transportation.

NON-SOLICITATION OF PERSONNEL: Centrworks and Customer each acknowledge and agree that in the course of performing its obligations under this Service Agreement, each party may be introduced to or come to know and work with employees, agents, representatives, vendors, suppliers and sub-contractors of the other and each agrees that the employees, agents, representatives, vendors, suppliers and sub-contractors of the other are valuable resources, in whom each party has invested considerable time, effort and resources. Therefore, each party agrees that for the duration of this Service Agreement and for one (1) year thereafter, neither party shall directly or indirectly solicit, interfere with or, entice away from (whether as an employee, agent, representative, consultant, independent contractor or otherwise) any employee of the other. Any violation of this provision shall result in the party in breach compensating the other within ten (10) business days in the amount of said employee's annual compensation including all benefits.



CENTRIWORKS

a THERMOCOPY company

Schedule A Equipment Addendum

Qty	Product #	Description	Serial Number	ID#
	409236	Ricoh Pro 8300s		
	409236	Ricoh Pro 8300s		
	409236	Ricoh Pro 8300s		
	418309	Ricoh IM C4500		
	418309	Ricoh IM C4500		
	418300	Ricoh IM C3500		
	418300	Ricoh IM C3500		
	418300	Ricoh IM C3500		
	418300	Ricoh IM C3500		
	418292	Ricoh IM C3000		
	418292	Ricoh IM C3000		
	418292	Ricoh IM C3000		
	418292	Ricoh IM C3000		
	418320	Ricoh IM C6000		
	418284	Ricoh IM C2500		
	418284	Ricoh IM C2500		
	418284	Ricoh IM C2500		
	418284	Ricoh IM C2500		
	418284	Ricoh IM C2500		
	418284	Ricoh IM C2500		
	418284	Ricoh IM C2500		
	418775	Ricoh IM 7000		
	418775	Ricoh IM 7000		
	418775	Ricoh IM 7000		
	418775	Ricoh IM 7000		
	418775	Ricoh IM 7000		
	418775	Ricoh IM 7000		
	418775	Ricoh IM 7000		
	418828	Ricoh IM 5000		
	418828	Ricoh IM 5000		
	418819	Ricoh IM 2500		
	418819	Ricoh IM 2500		
	418825	Ricoh IM 3500		
	418825	Ricoh IM 3500		

Initial



Print Good and Services UC Systemwide
Executive Summary

Lead Agency: University of California

Solicitation: # 001811-FEB2020

RFP Issued: April 21, 2020

Pre-Proposal Date: April 27, 2020

Response Due Date: September 13, 2019

Proposals Received: # 6

RICOH

Awarded to: imagine. change.

Agreement No. 2021002788

The University of California, Office of the President (UC) issued RFP # 00811-FEB2020 on April 21, 2020 to establish a national cooperative contract to assist UC and national participating agencies, in obtaining the best, most cost-effective and efficient procurement program for MFDs, Laser Printers, related goods, services and supplies.

The Regents of the University of California partnered with OMNIA Partners to include a national cooperative purchasing opportunity:

The purpose of this Request for Proposal (the "RFP") is to invite qualified Printer Manufacturers ("Supplier(s)") to prepare and submit proposals to the University of California ("UC") to provide multifunction devices ("MFDs") with copy, print, scan and optional fax functionality, and/or Laser Printers, along with products and support ("Print Goods and Services") all in accordance with Federal and State of California laws and the requirements of the UC as further detailed in this RFP. The UC has partnered with OMNIA Partners to make the resultant agreement a national cooperative agreement which public agencies, across the country, will be able to utilize.

The overall objective of this RFP is to select a Supplier, or multiple Suppliers, to assist UC, and national participating agencies, in obtaining the best, most cost-effective and efficient procurement program for MFDs, Laser Printers, related goods, services and supplies. In addition, Qualified proposers are invited to submit proposals, based on the information provided in this RFP with the intent to establish a business alliance with UC and OMNIA Partners, that will maximize the resources of both organizations to most effectively meet national participating agencies', and the UC's, needs.

Notice of the solicitation was sent to potential offerors, as well as advertised in the following:

- CalUSource website
- OMNIA Partners, Public Sector website
- USA Today, nationwide
- Arizona Business Gazette, AZ
- San Bernardino Sun, CA
- Honolulu Star-Advertiser, HI
- The Advocate – New Orleans, LA
- New Jersey Herald, IL
- Times Union, NY
- Daily Journal of Commerce, OR
- The State, SC
- Houston Community Newspapers, Cy Creek Mirror, TX
- Deseret News, UT
- Richmond Times, VA
- Seattle Daily Journal of Commerce, WA
- Helena Independent Record, MT
- Las Vegas Review Journal, NV
- The Herald-News, IL

On June 5, 2020 proposals were received from the following offerors:

- Canon Solutions America
- Hewlett Packard (HP)
- Konica Minolta Business Solutions
- Ricoh Americas Corporation
- Toshiba America Business Solutions
- Xerox Corporation

The proposals were evaluated by an evaluation committee. Using the evaluation criteria established in the RFP, the committee determined that Ricoh demonstrated the ability to provide the products and services outlined in the solicitation while offering competitive pricing to members. UC executed a purchasing agreement on January 29, 2021.

Contract Highlights:

Ricoh USA (RUS) markets and distributes Ricoh products and services in North America and Canada. Supporting the marketing and sales for its services and full line of digital office solutions, Ricoh utilizes a nationwide network of more than 380 independent dealers as well as more than 200 Ricoh Direct Sales Offices

Contract includes:

- Technology and Software – Workplace Solutions
- MFD, Laser Printers – Monochrome & Color
- MPS for Non-UC Participating Agencies

Term:

Initial five (5) year agreement from January 26, 2021 through January 25, 2026 with the option to renew for five (5) additional one-year periods through January 25, 2031.

Pricing/Discount:

Provided a discounted price list for the most common components of product offerings such as equipment, software, services, and solutions in a not-to-exceed model. Contact Ricoh for more details.

OMNIA Partners, Public Sector Web Landing Page:

<https://public.omniapartners.com/suppliers/ricoh/contract-documentation>

**USFR Compliance Questionnaire for RFP # 001811-FEB2020
Print Goods & Services**

	<u>YES/NO</u>	<u>COMMENTS</u>
1. Based upon review of this contract for the procurement of construction, materials, and/or services that exceeded \$100,000, did the cooperative follow the School District Procurement Rules (R7-2-1001 et seq)?	YES	
a. For this contracts awarded through competitive sealed bidding or competitive sealed proposals, did the cooperative:		
1) Give adequate notice of the invitation for bid (IFB) or request for proposal (RFP)? R7-2-1022 or R7-2-1042(C)	YES	Proof of Publication
2) Compile and maintain a list of persons who requested to be added to a list of prospective bidders, if any? R7-2-1023	YES	Event Summary; Supplier List
3) Issue the IFB or RFP at least 14 days before the due date and time set for bid or proposals, as applicable, unless a shorter time was determined necessary? R7-2-1024(A) or R7-2-1042(B)	YES	Event and Process Summary; Timeline
4) Include all required information in the IFB or RFP? (Note: If the answer is "No," the "Comments" should specifically indicate which requirements were not complied with.) R7-2-1024(B) or R7-2-1042(A)	YES	Event and Process Summary and CalUSource
5) Stamp sealed bids or proposals with the time and date upon receipt and store bids or proposals unopened until the due date and time set for opening? R7-2-1029 or R7-2-1045	YES	Event Summary; Suppliers "Participation Status"
6) If a multiple award was made for the IFB or RFP:		
i. Did the cooperative establish and follow procedures for the use of multiple award contracts? R7-2-1031(D) and R7-2-1050(C)	YES	RFP Event & Process Summary; Section A,
ii. Did the cooperative include in the solicitation(s) notification that multiple contracts may be awarded, the cooperative's basis for determining whether to award multiple contracts, and the criteria for selecting vendors for the multiple contracts? R7-2-1031(C) and R7-2-1050(B)	YES	RFP Event & Process Summary, Section A
iii. Determine, with the specific reason(s) in writing, that a single award was not advantageous to the cooperative's members and retain documentation that supported the basis for a multiple award? R7-2-1031(D)	N/A	
iv. Limit contract awards to the least number of suppliers necessary to meet the requirements of the members? R7-2-1031(D) and R7-2-1050(C)	YES	

	<u>YES/NO</u>	<u>COMMENTS</u>
7) For contracts where only one responsive bid or proposal was received, determine that the price submitted was fair and reasonable, and that either other prospective offerors had reasonable opportunity to respond or there was not adequate time for resolicitation, and retain documentation that supported the basis for the determination? R7-2-1032 or R7-2-1046(A)(1)	N/A	
b. For this contract awarded through competitive sealed bidding, did the cooperative award the contracts to the lowest responsible and responsive bidder whose bid conformed, in all material respects, to the requirements and evaluation criteria set forth in the IFB? (Note: If the answer is "No," the "Comments" should specifically indicate which requirements were not complied with.) R7-2-1031	N/A	
c. For this contract awarded through competitive sealed proposals, did the cooperative award the contract to the offeror whose proposal was determined, with the specific reason(s) in writing, to be most advantageous to the cooperative's members based on the factors set forth in the RFP and retain documentation that supported the determination? R7-2-1050	YES	
2. Did the cooperative have signed conflict-of-interest disclosures filed for any employee or nonemployee evaluation committee members? R7-2-1008 and R7-2-1015	N/A	Not a requirement by Lead Agency; Members listed in Process Summary; pg. 9
3. If the cooperative used a qualified select bidders list to procure construction services, did the cooperative comply with requirements of R7-2-1101?	N/A	
4. If the cooperative used construction-manager-at-risk, design-build, or job-order-contracting to procure construction services, did the cooperative comply with the requirements of R7-2-1100 through R7-2-1115?	N/A	
5. If the cooperative procured goods and services using reverse auctions or electronic bidding, did the cooperative comply with the requirements of R7-2-1018, R7-2-1021, or R7-2-1041?	N/A	
6. For purchases made through the Simplified School Construction Procurement Program, did the cooperative follow the requirements of R7-2-1033? (Note: If the answer is "No," the "Comments" should specifically indicate which requirements were not complied with.)	N/A	
7. If the cooperative used multi-term contracts for any of the contracts tested in question 1:		
a. Were the terms and conditions of renewal or extension, if any, included in the IFB or RFP? A.R.S. §15-213(K) and R7-2-1093	YES	RFP Event & Process Summary, Section N
b. For materials or services and contracts for job-order-contracting construction services that were entered into for more than 5 years, did the cooperative determine in writing, before the procurement solicitation was issued, that a contract of longer duration would be advantageous to its members? A.R.S. §15-213(K) and R7-2-1093	N/A	
8. Did the cooperative prevent additional purchases by new members that would materially change the volume of goods or services estimated in the original solicitation? R7-2-1011	YES	

	<u>YES/NO</u>	<u>COMMENTS</u>
9. Did the cooperative maintain current cooperative purchasing agreements with participating school districts? R7-2-1191 through R7-2-1195	YES	
For questions 10 and 11: If the cooperative had any emergency or sole source procurements, the audit firm must test <u>all</u> such procurements.		
10. Based upon review of any emergency procurements, was the basis for each emergency procurement reasonable; did the cooperative maintain a written statement for each emergency procurement documenting the basis for the emergency, the selection of the particular contractor, and why the price paid was reasonable; and was such statement signed by the individual authorized to initiate emergency procurements? R7-2-1055 and R7-2-1056	N/A	
11. Based upon review of any sole source procurements, was the basis for the sole source procurement reasonable, and did the cooperative retain its written determination that there was only one source for the required materials, service, or construction items? R7-2-1053	N/A	

Oak Ridge Schools

5th Attendance Period

February 7, 2023

These numbers reflect the **2022-2023** Skyward Student Management System (Entity) active student enrollment count as of **February 7, 2023**.

The total includes **33** private school and home-schooled students receiving Special Ed services.



Oak Ridge Schools

Enrollment Entity Counts 5th RP 2022-23

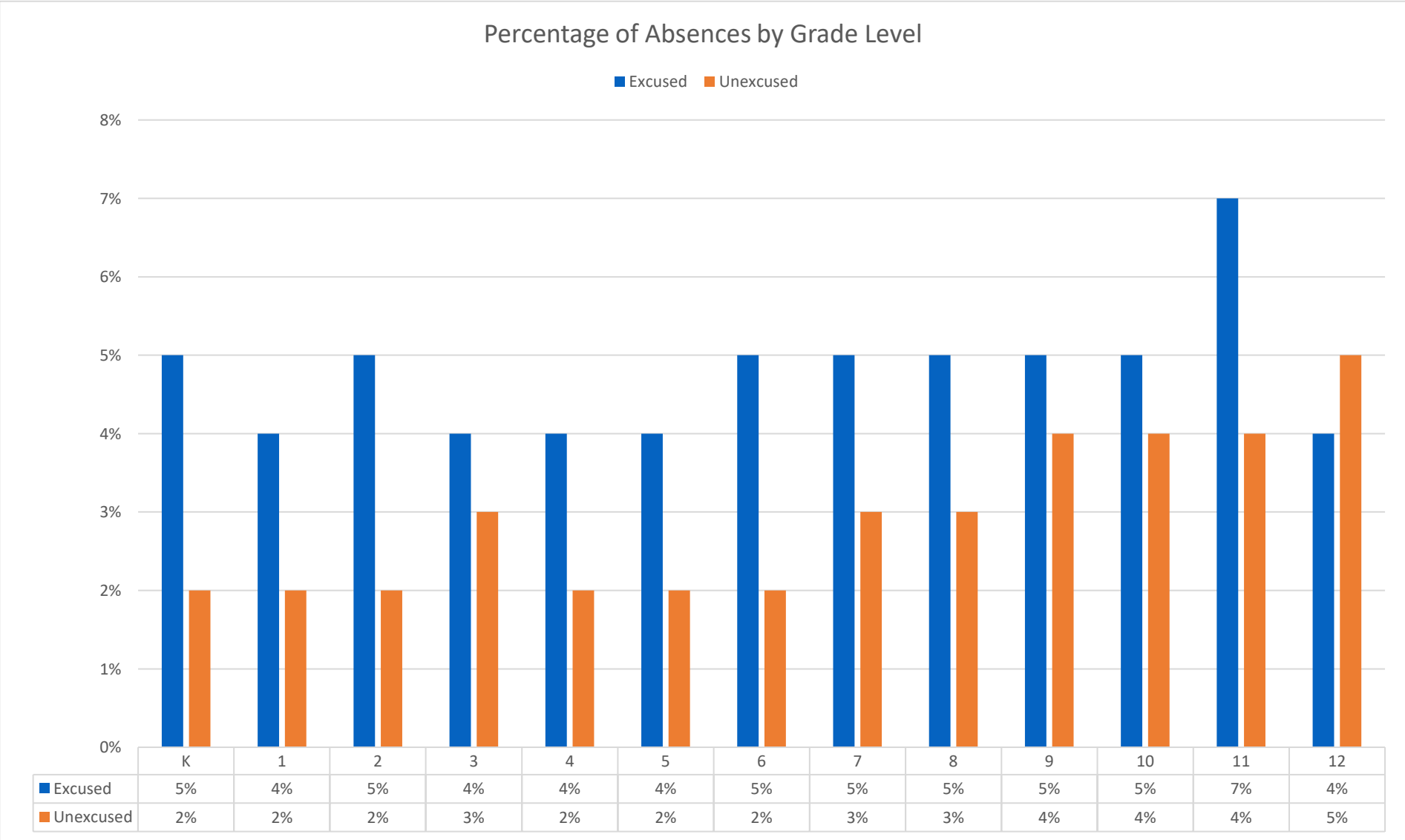
February 7, 2023

School	P3	P4	K	1	2	3	4	5	6	7	8	9	10	11	12	Total PK-12 2022-23	Previous 4th RP 2022-23	Diff
Preschool	86	142														228	224	4
Glenwood			67	71	55	72	74									339	346	-7
Linden			101	101	102	117	124									545	545	0
Willow Brook			73	89	83	79	73									397	390	7
Woodland			72	93	82	89	77									413	415	-2
JMS								161	156	196	200					713	723	-10
RMS								162	171	195	172					700	697	3
ORHS												410	403	389	357	1559	1583	-24
Enrollment 2022-23	86	142	313	354	322	357	348	323	327	391	372	410	403	389	357	4894	4923	-29
Prev. 4th RP 2022-23	81	143	312	351	319	365	349	326	329	393	372	411	405	388	379	4923		
Difference	5	-1	1	3	3	-8	-1	-3	-2	-2	0	-1	-2	1	-22	-29		

This report compares the 2022-23 5th RP period enrollment with the 2022-23 4th RP period.

Attendance Graphs

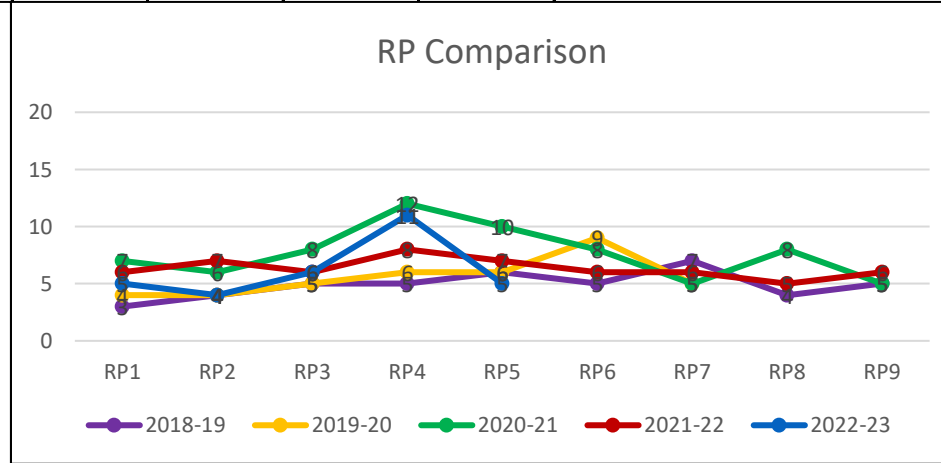
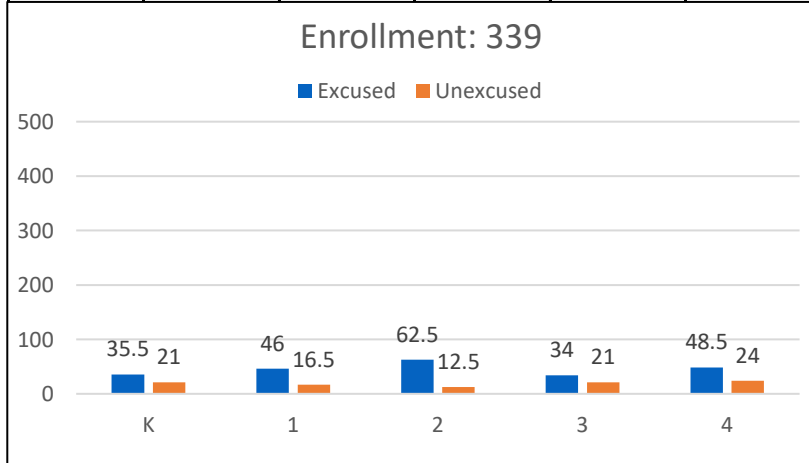
The graphs below display excused and unexcused absence totals, entity counts, and attendance percentages by grade and reporting period.
 The data was compiled using information from attendance detail and summary reports and entity counts reports.
 Reporting Period 5: 12/7/2022-1/20/2023



* Percentages have been rounded to the nearest whole number.

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%	RP6: 7.5%	RP7: 5.3%	RP8: 8%	RP9: 5.4%
2021-22	RP1: 6.3%	RP2: 6.7%	RP3: 6.3%	RP4: 7.7%	RP5: 6.9%	RP6: 5.8%	RP7: 6.3%	RP8: 5.4%	RP9: 5.9%
2022-23	RP1: 4.9%	RP2: 4.4%	RP3: 5.5%	RP4: 11%	RP5: 4.7%				

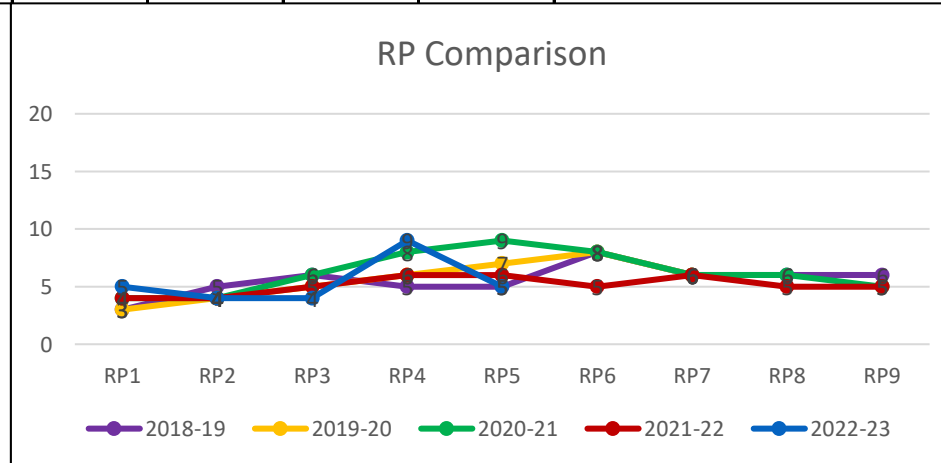
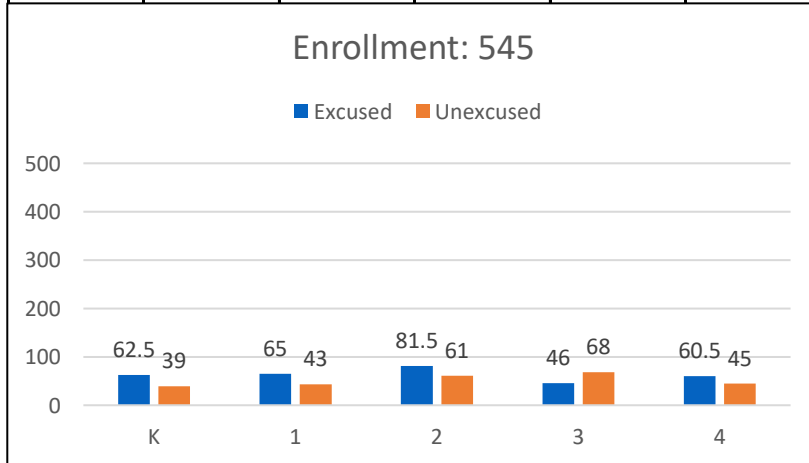
Glenwood



Goal
5.5

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%	RP6: 7.9%	RP7: 6.2%	RP8: 5.6%	RP9: 5.3%
2021-22	RP1: 4.4%	RP2: 4.2%	RP3: 4.8%	RP4: 6.4%	RP5: 5.8%	RP6: 4.6%	RP7: 5.5%	RP8: 5.4%	RP9: 5%
2022-23	RP1: 3.2%	RP2: 4%	RP3: 4.4%	RP4: 8.9%	RP5: 5.4%				

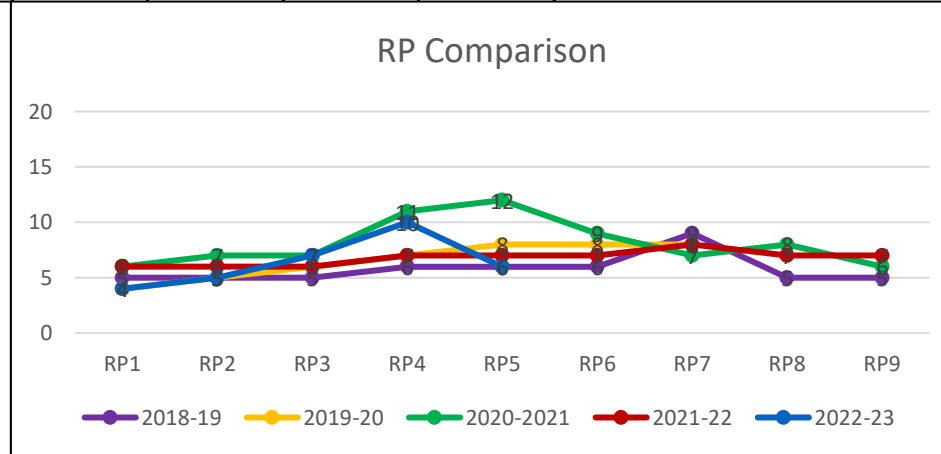
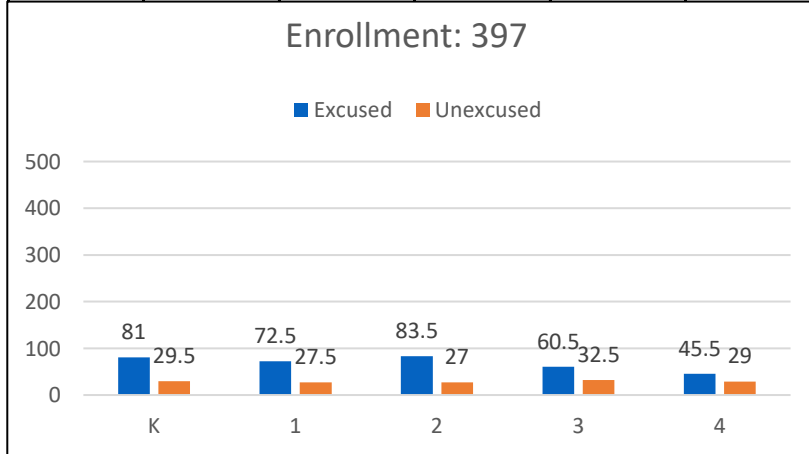
Linden



Goal
5

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%	RP6: 8.9%	RP7: 6.9%	RP8: 7.5%	RP9: 6.4%
2021-22	RP1: 6.1%	RP2: 6%	RP3: 6.4%	RP4: 6.9%	RP5: 6.6%	RP6: 6.5%	RP7: 8%	RP8: 6.6%	RP9: 7.4%
2022-23	RP1: 3.6%	RP2: 4.7%	RP3: 7%	RP4: 10%	RP5: 6.4%				

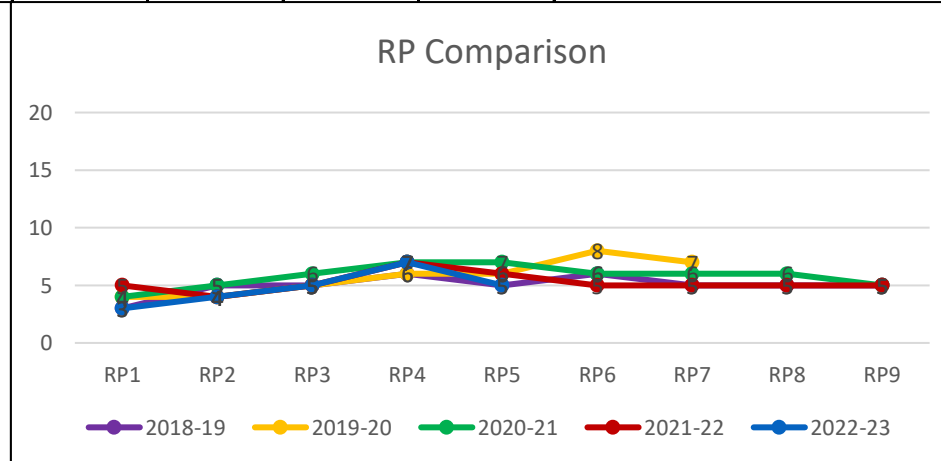
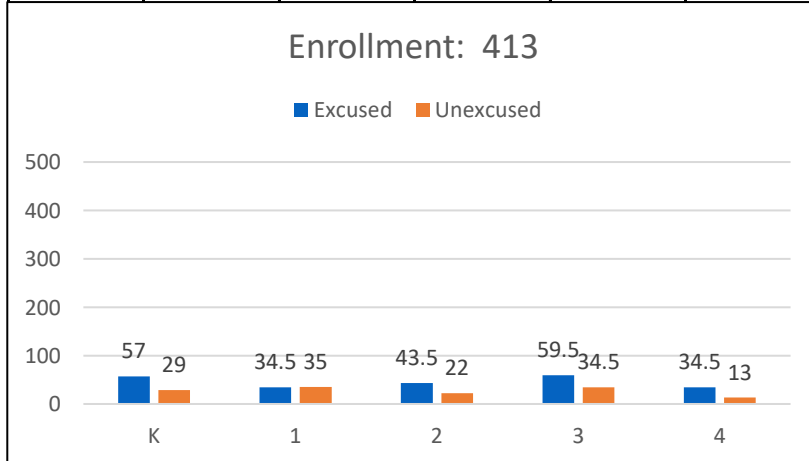
Willow Brook



Goal
6

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%	RP6: 5.9%	RP7: 5.5%	RP8: 5.9%	RP9: 5.3%
2021-22	RP1: 4.5%	RP2: 4.1%	RP3: 4.8%	RP4: 6.7%	RP5: 5.9%	RP6: 5%	RP7: 4.7%	RP8: 4.5%	RP9: 5.2%
2022-23	RP1: 2.6%	RP2: 3.7%	RP3: 5.2%	RP4: 6.6%	RP5: 4.5%				

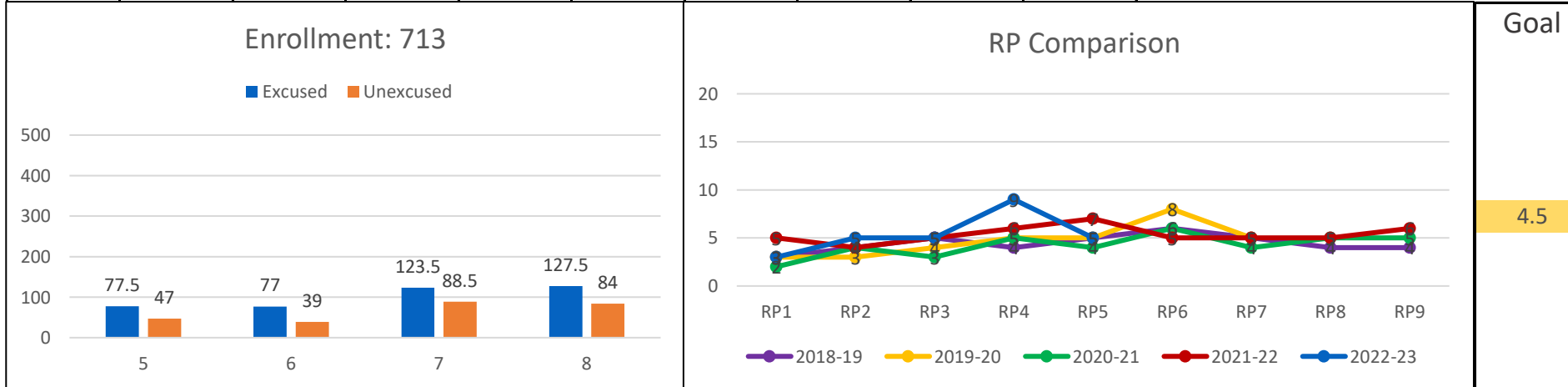
Woodland



Goal
4

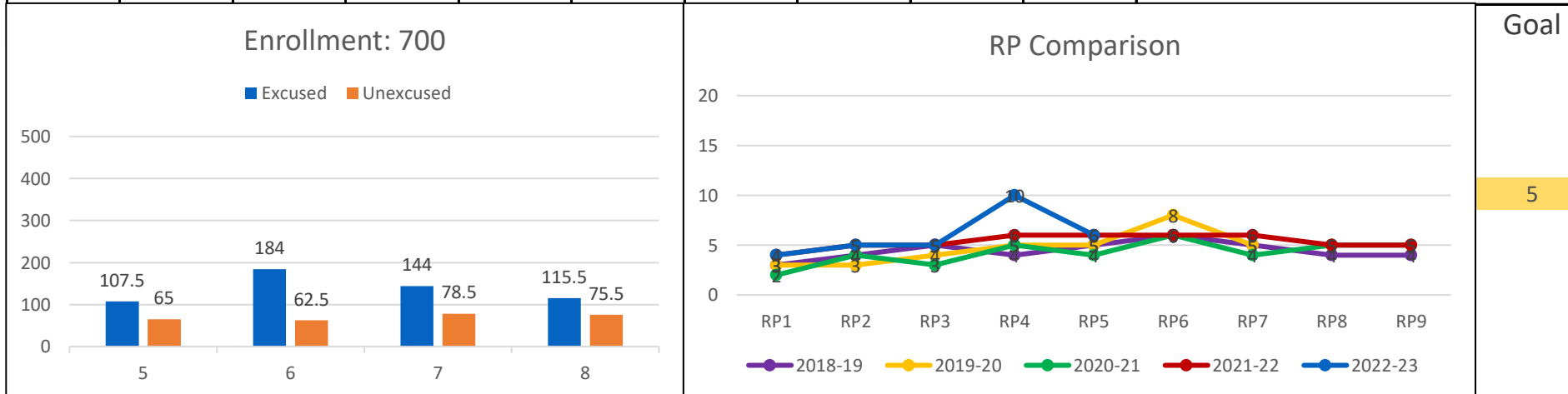
2018-19	RP1: 3%	RP2: 4%	RP3: 5%	RP4: 4%	RP5: 5%	RP6: 6%	RP7: 5%	RP8: 4%	RP9: 4%
2019-20	RP1: 3%	RP2: 3%	RP3: 4%	RP4: 5%	RP5: 4.9%	RP6: 8.4%	RP7: 5.2%	Covid-19	Covid-19
2020-21	RP1: 2.2%	RP2: 4.1%	RP3: 3.4%	RP4: 4.5%	RP5: 3.8%	RP6: 5.7%	RP7: 3.7%	RP8: 5.1%	RP9: 4.7%
2021-22	RP1: 5.1%	RP2: 4.2%	RP3: 4.9%	RP4: 5.9%	RP5: 6.8%	RP6: 5.4%	RP7: 5.3%	RP8: 4.9%	RP9: 6.1%
2022-23	RP1: 3.1%	RP2: 4.6%	RP3: 5%	RP4: 8.7%	RP5: 4.7%				

Jefferson



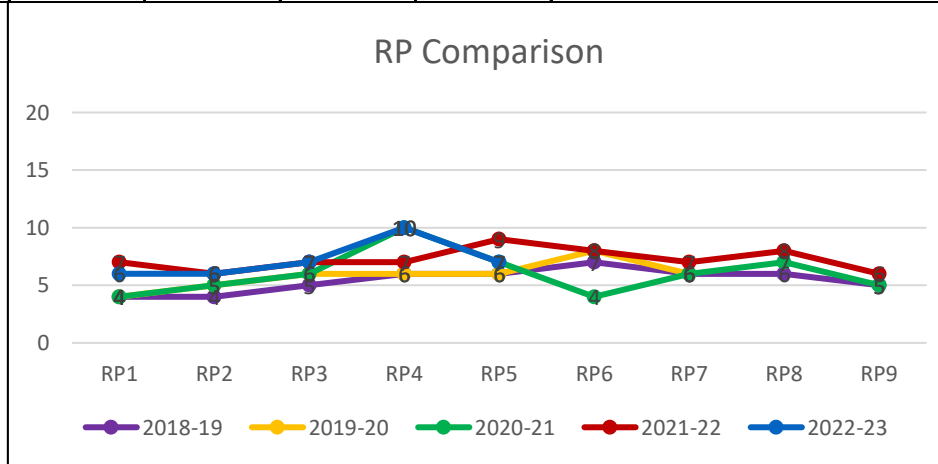
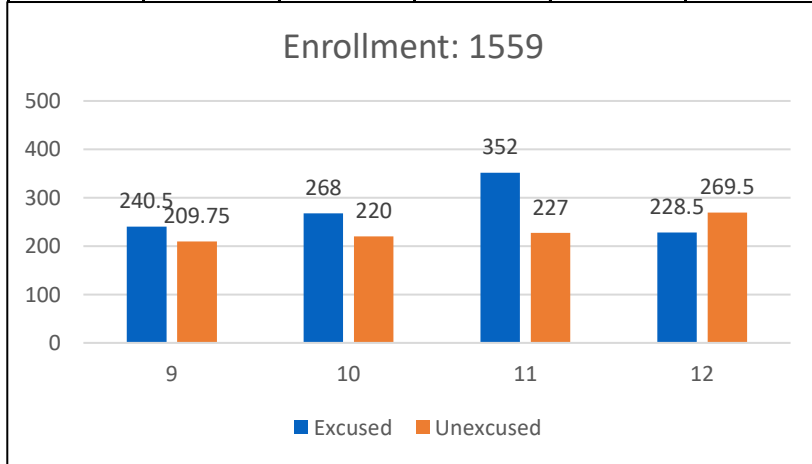
2018-19	RP1: 4%	RP2: 5%	RP3: 6%	RP4: 5%	RP5: 5%	RP6: 8%	RP7: 6%	RP8: 5%	RP9: 6%
2019-20	RP1: 4%	RP2: 4%	RP3: 5%	RP4: 5.7%	RP5: 5.6%	RP6: 7.9%	RP7: 5.7%	Covid-19	Covid-19
2020-21	RP1: 2%	RP2: 2.3%	RP3: 3.4%	RP4: 4%	RP5: 2.7%	RP6: 3.3%	RP7: 2.8%	RP8: 5.6%	RP9: 5.1%
2021-22	RP1: 4.2%	RP2: 4.7%	RP3: 5.4%	RP4: 5.8%	RP5: 5.9%	RP6: 5.5%	RP7: 5.6%	RP8: 5%	RP9: 5.3%
2022-23	RP1: 4.4%	RP2: 4.5%	RP3: 5.4%	RP4: 9.7%	RP5: 6.1%				

Robertsville



2018-19	RP1: 4%	RP2: 4%	RP3: 5%	RP4: 6%	RP5: 6%	RP6: 7%	RP7: 6%	RP8: 6%	RP9: 5%
2019-20	RP1: 4%	RP2: 5%	RP3: 6%	RP4: 6.2%	RP5: 6.4%	RP6: 7.6%	RP7: 6.4%	Covid-19	Covid-19
2020-21	RP1: 3.6%	RP2: 4.6%	RP3: 5.5%	RP4: 9.9%	RP5: 6.8%	RP6: 3.8%	RP7: 5.8%	RP8: 7.1%	RP9: 5.1%
2021-22	RP1: 7.2%	RP2: 6.2%	RP3: 6.9%	RP4: 7.3%	RP5: 9.2%	RP6: 8.2%	RP7: 7%	RP8: 8.2%	RP9: 6%
2022-23	RP1: 6%	RP2: 6.3%	RP3: 6.6%	RP4: 9.8%	RP5: 6.6%				

ORHS



Goal
6

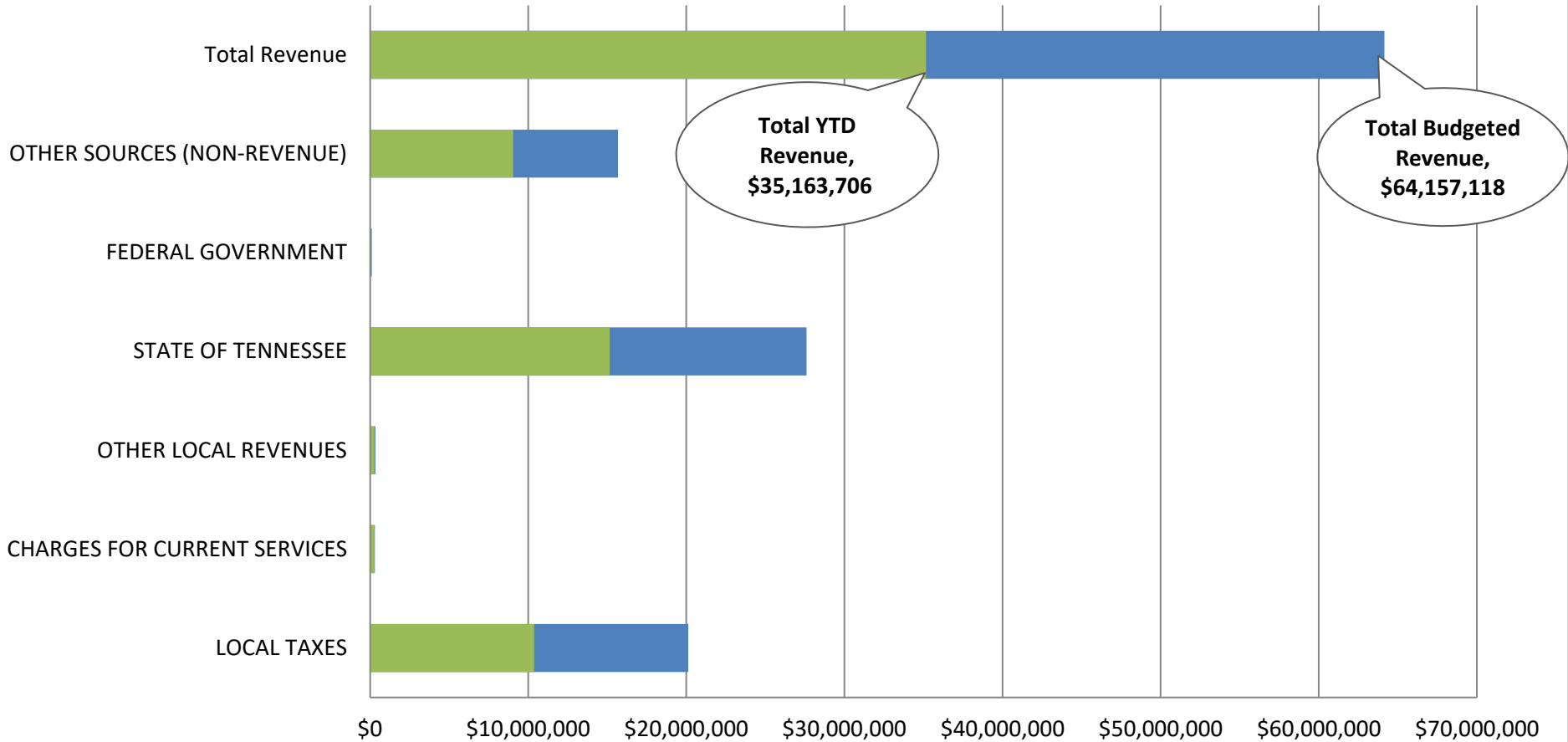
Acct	Acct	2022-23 FYTD Budget	January 2022-23 Monthly Activity	2022-23 Year-To-Date	2022-23 Percent of Budget	2022-23 Variance from Bud	Encumbered Amount	Unencumbered Budget Remaining
40110	Current Property Tax	12,832,909.00	3,717,544.68	6,120,451.10	47.69%	6,712,457.90		6,712,457.90
40210	Local Option Sales Tax	7,288,185.00	813,399.52	4,251,968.29	58.34%	3,036,216.71		3,036,216.71
40275	Mixed Drink Tax	125.00	29.07	280.78	224.62%	-155.78		-155.78
40280	Mineral Severance Tax	125.00				125.00		125.00
43511	Tuition - Regular Day Students	300,000.00	75,545.80	276,045.35	92.02%	23,954.65		23,954.65
43533	Transportation Fees	2,500.00	345.00	2,620.00	104.80%	-120.00		-120.00
44110	Interest Earned	20,000.00	49,947.21	201,236.25	1,006.18%	-181,236.25		-181,236.25
44120	Lease/Rentals	15,000.00		5,897.50	39.32%	9,102.50		9,102.50
44170	Miscellaneous Refunds	2,500.00		5,382.04	215.28%	-2,882.04		-2,882.04
44530	Sale of Equipment	35,000.00	3,401.80	20,248.00	57.85%	14,752.00		14,752.00
44570	Contributions & Gifts	193,075.00		33,975.00	17.60%	159,100.00		159,100.00
44990	Other Local Revenues	75,000.00	250.00	8,471.41	11.30%	66,528.59		66,528.59
46511	Basic Education Program	24,636,000.00	2,512,600.00	14,865,600.00	60.34%	9,770,400.00		9,770,400.00
46515	Early Childhood Education	459,638.78	39,337.19	191,642.41	41.69%	267,996.37		267,996.37
46590	Other State Education Funds	2,095,000.00	6,373.43	52,000.61	2.48%	2,042,999.39		2,042,999.39
46610	Career Ladder Program	90,100.00		49,039.26	54.43%	41,060.74		41,060.74
46980	Other State Grants	278,783.57				278,783.57		278,783.57
46990	Other State Revenues	45,189.00				45,189.00		45,189.00
47630	Public Law 874 - Maint/Operat.	25,000.00				25,000.00		25,000.00
47640	ROTC Reimbursement	79,600.00	25,133.50	33,777.52	42.43%	45,822.48		45,822.48
49700	Insurance Recovery	9,425.00		6,925.00	73.47%	2,500.00		2,500.00
49800	Transfers In	180,000.00				180,000.00		180,000.00
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	64,157,118.35	8,535,070.78	35,163,705.58	54.81%	28,993,412.77		28,993,412.77
=====								
71100	Regular Instruction Prgm	28,747,235.43	2,526,866.38	15,146,794.24	52.69%	13,600,441.19	12,782,990.24	817,450.95
71150	Alternative Instruction Prgm	887,470.54	80,564.33	446,943.12	50.36%	440,527.42	409,542.09	30,985.33
71200	Special Education Prgm	5,009,076.07	463,951.68	2,464,334.93	49.20%	2,544,741.14	2,297,388.07	247,353.07
71300	Career/Technical Education Prg	3,260,166.00	154,048.56	820,910.13	25.18%	2,439,255.87	784,540.66	1,654,715.21
71900	Contingency	704,088.42				704,088.42		704,088.42
72120	Health Services	683,610.28	58,881.53	357,234.48	52.26%	326,375.80	290,034.08	36,341.72
72130	Other Student Support	1,761,854.00	137,397.85	953,868.43	54.14%	807,985.57	605,223.34	202,762.23
72210	Regular Inst. Support	3,394,170.72	266,116.67	1,740,234.51	51.27%	1,653,936.21	1,231,323.52	422,612.69
72220	Special Education Support	810,552.29	71,619.88	432,486.64	53.36%	378,065.65	357,757.81	20,307.84
72230	Career & Technical Prg Support	126,935.00	10,624.12	62,866.35	49.53%	64,068.65	42,184.92	21,883.73
72250	Technology Services	2,701,152.00	259,484.77	1,541,346.48	57.06%	1,159,805.52	849,056.52	310,749.00
72290	Communications	189,240.00	11,228.26	76,107.58	40.22%	113,132.42	41,533.40	71,599.02
72310	Board of Education	1,138,493.00	110,430.56	661,753.83	58.13%	476,739.17	6,698.41	470,040.76

Acct	Acct	2022-23 FYTD Budget	January 2022-23 Monthly Activity	2022-23 Year-To-Date	2022-23 Percent of Budget	2022-23 Variance from Bud	Encumbered Amount	Unencumbered Budget Remaining
72320	Director of Schools	380,737.00	33,850.87	216,519.53	56.87%	164,217.47	147,721.36	16,496.11
72410	Office of the Principal	4,147,007.13	383,820.05	2,381,666.56	57.43%	1,765,340.57	1,704,994.76	60,345.81
72510	Fiscal Services	946,730.00	82,116.07	553,116.01	58.42%	393,613.99	355,957.25	37,656.74
72520	Human Resources/ Personnel	456,101.00	45,985.69	259,973.72	57.00%	196,127.28	156,408.89	39,718.39
72610	Operation of Plant	4,570,050.28	421,171.24	2,602,288.50	56.94%	1,967,761.78	965,663.50	1,002,098.28
72620	Maintenance of Plant	1,927,577.00	167,160.73	1,156,072.09	59.98%	771,504.91	685,862.86	85,642.05
72710	Transportation	1,716,795.00	139,709.45	706,521.43	41.15%	1,010,273.57		1,010,273.57
73400	Early Childhood Education	459,638.78	45,029.88	236,672.29	51.49%	222,966.49	224,859.26	-1,892.77
73401	Pre-K General Fund	749,282.00	71,455.20	401,957.38	53.65%	347,324.62	256,124.97	91,199.65
76100	Regular Capital Outlay	1,911,201.41		561,789.59	29.39%	1,349,411.82	605,007.43	744,404.39
82130	Education Principal on Debt	6,809.00		5,920.87	86.96%	888.13		888.13
82230	Education Interest on Debt	191.00		166.09	86.96%	24.91		24.91
99100	Transfers Out	79,501.00				79,501.00		79,501.00
-----	Expense	66,765,664.35	5,541,513.77	33,787,544.78	50.61%	32,978,119.57	24,800,873.34	8,177,246.23
-----	General Purpose School Fund	-2,608,546.00	2,993,557.01	1,376,160.80	52.67%	-3,984,706.80	-24,800,873.34	20,816,166.54
	Grand Revenue Totals	64,157,118.35	8,535,070.78	35,163,705.58	54.81%	28,993,412.77		28,993,412.77
	Grand Expense Totals	66,765,664.35	5,541,513.77	33,787,544.78	50.61%	32,978,119.57	24,800,873.34	8,177,246.23
	Grand Totals	2,608,546.00	2,993,557.01	1,376,160.80	-52.76%	3,984,706.80	24,800,873.34	20,816,166.54
		Loss	Profit	Profit		Loss	Loss	Profit

Number of Accounts: 1326

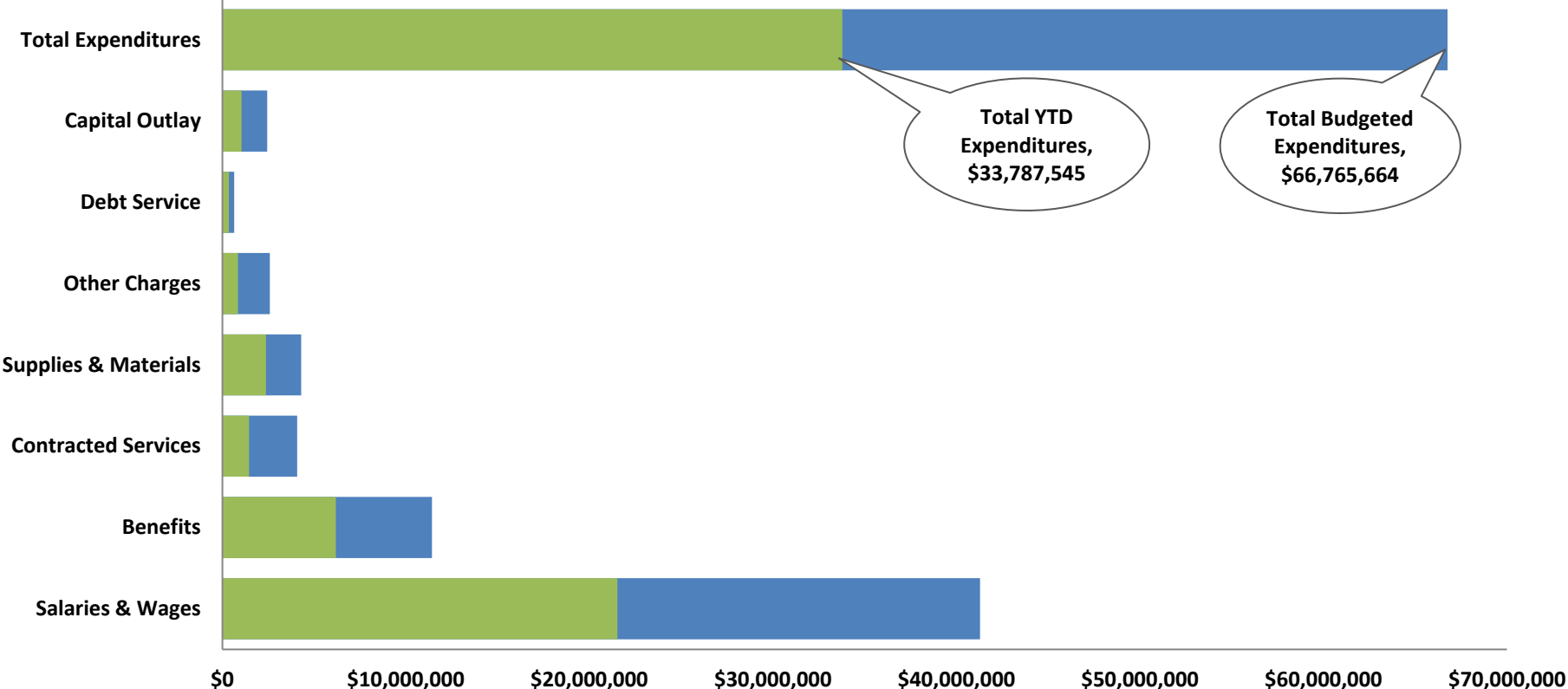
***** End of report *****

General Fund Revenue Budget to Actual Summary - January, 2023



	LOCAL TAXES	CHARGES FOR CURRENT SERVICES	OTHER LOCAL REVENUES	STATE OF TENNESSEE	FEDERAL GOVERNMENT	OTHER SOURCES (NON-REVENUE)	Total Revenue
■ Percent of Budget	51.55%	92.12%	80.81%	54.91%	32.29%	57.67%	54.81%
■ Year-To-Date	10,372,700.17	278,665.35	275,210.20	15,158,282.28	33,777.52	9,045,070.06	\$35,163,706
■ FYTD Budget	20,121,344.00	302,500.00	340,575.00	27,604,711.35	104,600.00	15,683,388.00	\$64,157,118

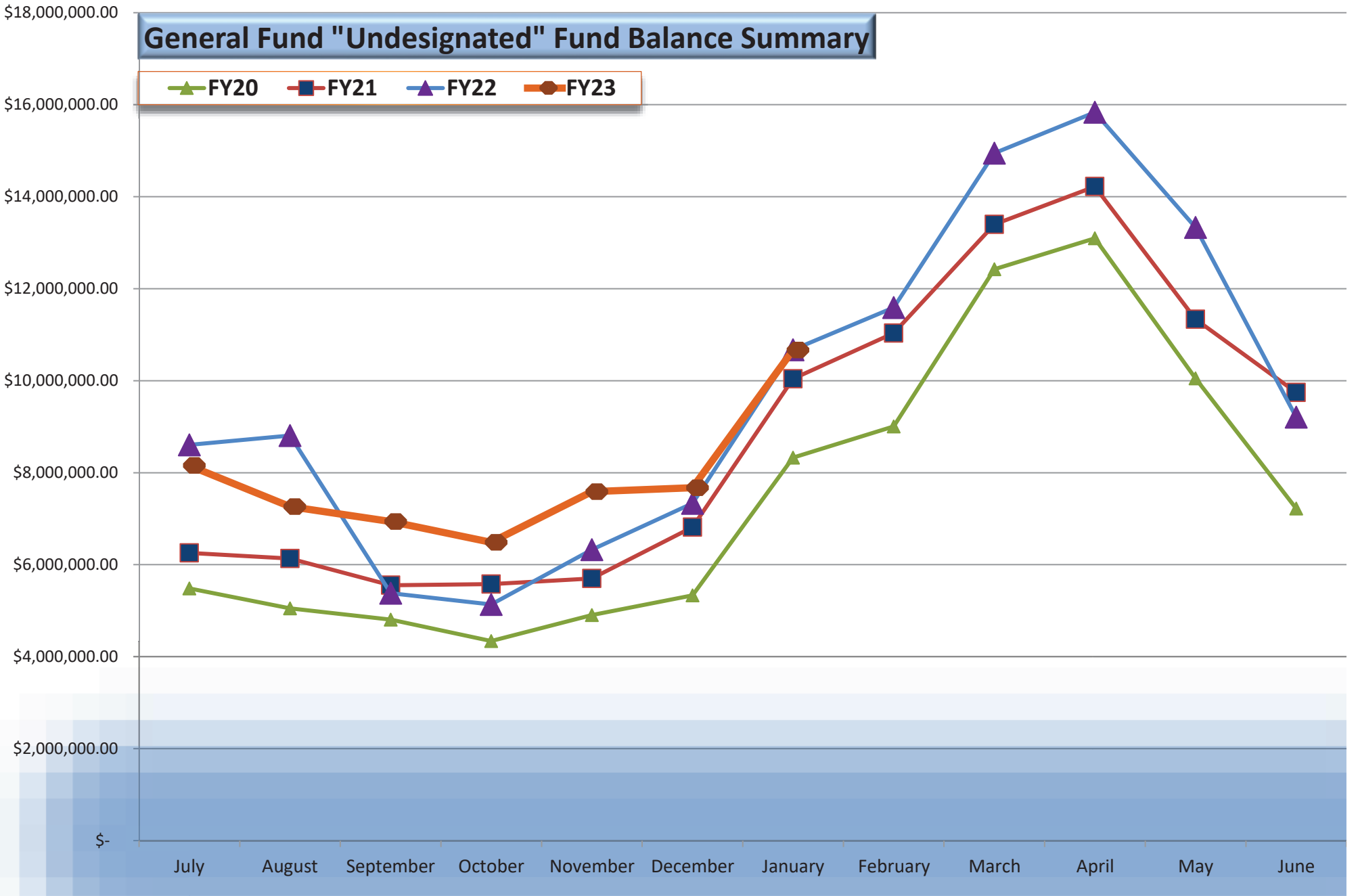
General Fund Expenditure Budget to Actual Summary by Object January, 2023



	Salaries & Wages	Benefits	Contracted Services	Supplies & Materials	Other Charges	Debt Service	Capital Outlay	Total Expenditures
■ FYTD %	52.15	54.16	35.88	55.27	32.6	55.28	42.18	50.61%
■ FYTD Activity	21,524,562.94	6,185,213.43	1,453,337.46	2,376,351.47	847,367.68	356,086.96	1,044,624.84	\$33,787,545
■ FYTD Revised Bdgt	41,291,556.98	11,420,386.10	4,075,284.51	4,299,380.98	2,590,512.42	644,205.00	2,444,338.36	\$66,765,664

General Fund "Undesignated" Fund Balance Summary

FY20 FY21 FY22 FY23



Acct	Acct	2022-23 FYTD Budget	January 2022-23 Monthly Activity	2022-23 Year-To-Date	2022-23 Percent of Budget	2022-23 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
142	School Federal Projects							
R	Revenue							
47131	Vocational Program Improvement	130,654.24	8,516.05	44,309.36	33.91%	86,344.88		86,344.88
47141	Title I	1,155,093.06	110,598.96	412,683.43	35.73%	742,409.63		742,409.63
47143	Special Education Grants	1,308,702.05	88,365.89	393,308.98	30.05%	915,393.07		915,393.07
47145	Special Ed Pre-School Grants	40,634.91	2,586.08	12,927.28	31.81%	27,707.63		27,707.63
47146	English Lang Acq Grants	20,399.15		7,532.78	36.93%	12,866.37		12,866.37
47147	Title IV Part B, 21st Century	159,405.79	15,981.85	53,875.44	33.80%	105,530.35		105,530.35
47189	Title II	187,021.12	27,524.76	101,863.68	54.47%	85,157.44		85,157.44
47307	COVID-19 Grant B	476,304.00	26,960.00	250,870.99	52.67%	225,433.01		225,433.01
47309	COVID-19 Grant D	30,000.00		30,000.00	100.00%			
47310	COVID-19 Grant E	470,771.04	11,970.17	263,164.28	55.90%	207,606.76		207,606.76
47401	ESSER 3.0	3,710,369.99	88,942.49	834,259.67	22.48%	2,876,110.32		2,876,110.32
47402	American Rescue Plan	204,963.44	7,366.33	26,435.42	12.90%	178,528.02		178,528.02
47403	American Rescue Plan PreK	16,510.39	1,725.24	8,626.20	52.25%	7,884.19		7,884.19
47404	ARP Homeless Grant	49,185.66		1,766.97	3.59%	47,418.69		47,418.69
47590	Other Federal Through State	1,005,917.82	44,476.81	185,999.34	18.49%	819,918.48		819,918.48
47990	Other Direct Fedral Revenue	1,065,944.34	84,032.07	427,571.00	40.11%	638,373.34		638,373.34
----	Revenue	10,031,877.00	519,046.70	3,055,194.82	30.45%	6,976,682.18		6,976,682.18
E	Expense							
71100	Regular Instruction Prgm	2,441,330.93	102,648.61	889,701.69	36.44%	1,551,629.24	346,146.90	1,205,482.34
71200	Special Education Prgm	1,279,327.70	96,455.25	486,231.97	38.01%	793,095.73	427,077.35	366,018.38
71300	Career/Technical Education Prg	553,808.04	14,132.89	311,792.55	56.30%	242,015.49	169,502.15	72,513.34
71900	Contingency	391,125.20				391,125.20		391,125.20
72120	Health Services	262,338.56	22,677.73	106,725.69	40.68%	155,612.87	65,560.53	90,052.34
72130	Other Student Support	685,938.07	27,708.46	139,467.88	20.33%	546,470.19	83,890.36	462,579.83
72210	Regular Inst. Support	1,798,089.80	155,438.84	837,888.36	46.60%	960,201.44	423,228.53	536,972.91
72220	Special Education Support	363,580.88	19,638.38	121,577.07	33.44%	242,003.81	84,706.95	157,296.86
72230	Career & Technical Prg Support	5,000.00	29.48	680.36	13.61%	4,319.64	960.00	3,359.64
72250	Technology Services	20,265.70		4,169.40	20.57%	16,096.30	2,883.60	13,212.70
72510	Fiscal Services	46,200.00	3,347.50	14,787.50	32.01%	31,412.50	2,000.00	29,412.50
72710	Transportation	365,428.66		3,558.52	0.97%	361,870.14		361,870.14
73300	Community Services	1,209,080.48	114,800.35	602,883.48	49.86%	606,197.00	379,852.52	226,344.48
76100	Regular Capital Outlay	263,619.00		115,618.99	43.86%	148,000.01		148,000.01
99100	Transfers Out	346,743.98				346,743.98		346,743.98

Acct	Acct	2022-23 FYTD Budget	January 2022-23 Monthly Activity	2022-23 Year-To-Date	2022-23 Percent of Budget	2022-23 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
142	School Federal Projects							
E	Expense							
		10,031,877.00	556,877.49	3,635,083.46	36.24%	6,396,793.54	1,985,808.89	4,410,984.65
	School Federal Projects		-37,830.79	-579,888.64	33.35%	579,888.64	-1,985,808.89	2,565,697.53
143	Central Cafeteria							
R	Revenue							
	43521 Lunch Payments - Children	210,662.00	42,338.00	236,369.25	112.20%	-25,707.25		-25,707.25
	43522 Lunch Payments - Adults	2,500.00	348.00	2,388.00	95.52%	112.00		112.00
	43523 Income From Breakfast	29,771.00	6,124.65	33,375.20	112.11%	-3,604.20		-3,604.20
	43525 A la Carte Sales	164,814.00	9,866.90	51,172.79	31.05%	113,641.21		113,641.21
	43990 Other Charges for Food Service	66,192.00	7,060.99	24,742.64	37.38%	41,449.36		41,449.36
	44110 Interest Earned	5,524.00	3,158.14	11,787.03	213.38%	-6,263.03		-6,263.03
	46520 School Food Service	20,560.00				20,560.00		20,560.00
	47111 USDA School Lunch Program	996,986.00	169,341.37	568,851.42	57.06%	428,134.58		428,134.58
	47112 USDA Commodities	154,038.00				154,038.00		154,038.00
	47113 Breakfast	418,098.00	52,896.08	175,805.34	42.05%	242,292.66		242,292.66
	47114 USDA - Other	298,412.00	40,020.28	232,810.80	78.02%	65,601.20		65,601.20
	Revenue	2,367,557.00	331,154.41	1,337,302.47	56.48%	1,030,254.53		1,030,254.53
E	Expense							
	73100 Food Service	2,667,557.00	321,268.19	909,050.52	34.08%	1,758,506.48	51,388.14	1,707,118.34
	Expense	2,667,557.00	321,268.19	909,050.52	34.08%	1,758,506.48	51,388.14	1,707,118.34
	Central Cafeteria	-300,000.00	9,886.22	428,251.95	44.61%	-728,251.95	-51,388.14	-676,863.81

Acct	Acct	2022-23 FYTD Budget	January 2022-23 Monthly Activity	2022-23 Year-To-Date	2022-23 Percent of Budget	2022-23 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
145	Other Education Funds							
R	Revenue							
44990	Other Local Revenues	35,000.00	4,500.00	24,670.00	70.49%	10,330.00		10,330.00
46590	Other State Education Funds	120,151.65		18,696.24	15.56%	101,455.41		101,455.41
49800	Transfers In	79,501.00				79,501.00		79,501.00
-----	Revenue	234,652.65	4,500.00	43,366.24	18.48%	191,286.41		191,286.41
E	Expense							
72130	Other Student Support	18,177.00	889.78	2,937.32	16.16%	15,239.68	4,680.48	10,559.20
72620	Maintenance of Plant	90,540.00				90,540.00	69,022.24	21,517.76
73300	Community Services	125,935.65	11,633.10	70,103.43	55.67%	55,832.22	42,826.72	13,005.50
-----	Expense	234,652.65	12,522.88	73,040.75	31.13%	161,611.90	116,529.44	45,082.46
-----	Other Education Funds		-8,022.88	-29,674.51	24.80%	29,674.51	-116,529.44	146,203.95
			=====	=====	=====	=====	=====	=====
146	Extended School Program							
R	Revenue							
43581	Community Services Fees Child	363,430.00	41,805.00	268,962.00	74.01%	94,468.00		94,468.00
-----	Revenue	363,430.00	41,805.00	268,962.00	74.01%	94,468.00		94,468.00
E	Expense							
73300	Community Services	398,430.00	28,694.00	197,025.86	49.45%	201,404.14	98,309.07	103,095.07
99100	Transfers Out	10,000.00				10,000.00		10,000.00
-----	Expense	408,430.00	28,694.00	197,025.86	48.24%	211,404.14	98,309.07	113,095.07
-----	Extended School Program	-45,000.00	13,111.00	71,936.14	60.37%	-116,936.14	-98,309.07	-18,627.07

Acct	Acct	2022-23 FYTD Budget	January 2022-23 Monthly Activity	2022-23 Year-To-Date	2022-23 Percent of Budget	2022-23 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
146	Extended School Program							
=====								
Grand Revenue Totals		12,997,516.65	896,506.11	4,704,825.53	36.20%	8,292,691.12		8,292,691.12
Grand Expense Totals		13,342,516.65	919,362.56	4,814,200.59	36.08%	8,528,316.06	2,252,035.54	6,276,280.52
Grand Totals		345,000.00	22,856.45	109,375.06	31.70%	235,624.94	2,252,035.54	2,016,410.60
		Loss	Loss	Loss		Loss	Loss	Profit

Number of Accounts: 615

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

Combined Fund Balance and YTD Operating Statement Summary

January , 2023

Description	General	Federal	Food Service	Special	ECC
	Fund 141	Fund 142	Fund 143	Fund 145	Fund 146
Beginning Fund Balance July 1, 2022	14,913,924.06	0.00	1,925,793.59	26,611.48	147,838.44
Plus YTD Revenue per books 1/31/23	35,163,705.58	3,055,194.82	1,337,302.47	43,366.24	268,962.00
Less YTD Expenditures per books 1/31/23	(33,787,544.78)	(3,635,083.46)	(909,050.52)	(73,040.75)	(197,025.86)
Revenues Over (Under) Expenditures as of 1/31/23	1,376,160.80	(579,888.64)	428,251.95	(29,674.51)	71,936.14
Ending Fund Balance per books as of 1/31/23	16,290,084.86	(579,888.64)	\$2,354,045.54	(3,063.03)	219,774.58

Fund Balance Restricted/Committed/Assigned Status

Encumbrances and Deferred Revenue	\$ -		\$ 57,396.87		
Inventory					
Restricted for Career Ladder Program	-3.89				
Restricted for Operation of Non-Instructional Services			1,996,648.67		219,774.58
Committed for Other Purposes (Vehicles- ERR Fund)	0.00				
Committed for Other Purposes (Device Replacement)	3,000,000.00				
Assigned for Instruction- Coordinated School Health	2,319.69				
Assigned for other local grants					
Assigned for Instruction - Education Foundation Grant					
Assigned for Instruction (APSI-ORHS)	11,079.95				
Assigned for Support Services FRC Local Funds (56)				-3,063.03	
Nonspendable-Prepaid Expenditures					
Assigned to Balance FY23 Budget	2,608,546.00	0.00	300,000.00		
Unassigned Fund Balance 1/31/23	\$ 10,668,143.11	-579,888.64	0.00	0.00	
Total Fund Balance 1/31/23	16,290,084.86	\$(579,888.64)	\$ 2,354,045.54	\$(3,063.03)	\$ 219,774.58