

# Regular Board of Education Meeting

March 25, 2024 5:00 PM

Robert J. Smallridge School Administration Building

## I. Call to Order

## II. Pledge of Allegiance and Presentation of Colors

## III. School Program by Jefferson Middle School

## IV. Approval of Agenda

## V. Special Reports/Presentations

A. Good News

B. Governor Haslam's Volunteer of the Year Award Winner - ORHS Student

C. OREA Salary Proposal

D. Principal's Salary Proposal

## VI. Public Forum

## VII. Consent Agenda

A. Board Minutes 02-26-24

## VIII. Items for Action

A. FY24 Budget Transfer #2 & Budget Amendment #2 - Second Reading

B. FY25 Preschool Head Start Training and Technical Assistance Plan

C. FY25 Non-Resident Tuition Rates

D. FY25 District Elevator Service Contract

E. Waste Connections of Tennessee Inc. Services Contract

F. Replacement of HVAC at ORHS Performing Arts Center

G. Purchase and Installation of Serving Lines at Woodland Elementary

H. Purchase of Metal Carport Structure for Extended Childcare

I. Purchase of Classroom Amplification Systems

J. Selection of Jay Adams as ORS Volunteer of the Year

K. ORHS Track Field Trip to Birmingham, Alabama

L. Secret City Wildbots Field Trip to Houston, Texas

M. JMS Master Builders Field Trip to Houston, Texas

N. JMS RadioActive Brix Field Trip to Long Beach, California

O. RMS Field Trip to Williamsburg, Virginia

## IX. Items for Information

A. Enrollment and Attendance Reports

B. Financial Report - February 2024

## X. Items for Discussion

## XI. Old Business

## XII. New Business

## XIII. Communications

## XIV. Adjournment



## **Willow Brook Elementary**

WBES would like to thank the following community partners for their support of our students; Delta Kappa Gamma Sorority, Faith Bible Fellowship Church, and St. Stephens' Episcopal Church. These organizations provided items such as blankets, warm socks, flashlights, and snacks to fill emergency bags for families who are experiencing difficult situations or homelessness. Picky Chick donated clothing to the ORS Family Resource Center and toys to WB's Bear Bucks Store. Additionally, Friends of Literacy donated books for students to take home over spring break.

Fourth grade students went on a field trip to attend the *ORHS Masquers* performance of *Anastasia* last week! They were in awe of the ORHS students and had a wonderful time! Thank you to Ms. Terri Lloyd for organizing this event for our elementary schools.

WBES students participated in *Read Across America* March 1<sup>st</sup> through March 8<sup>th</sup> where they logged 3,365 pages during that time! We will let you know if they made it at the BOE meeting!

## **Woodland Elementary**

Woodland is proud to announce that second grade student, Kathleen Hernandez had her artwork chosen for ORNL FCU's Community Art & Mural Program. Kathleen's work will be featured on ORNL FCU's building mural. This program was introduced in 2017 to create and support initiatives that make the arts accessible to all in addition to helping our community thrive. The 2024 mural theme was "new beginnings." Congratulations to Woodland Hawk Kathleen Hernandez and her Art teacher Ms. Mary Katherine Chin!

## **Linden Elementary**

On February 27, Linden hosted its 3<sup>rd</sup> annual Black History Museum with students from Ms. Raven Little's 3<sup>rd</sup> grade class and Ms. Sonya Kyle's 4<sup>th</sup> grade class. Students shared about influential figures, moments, and icons of Black History. The hard work and dedication of these students was truly impressive and a great learning experience for students and teachers.

## **Jefferson Middle School**

ORNL FCU announced the students whose artwork was selected for the organization's Community Art & Mural Program. Congratulations to the following students and schools; Middle School Category winner Heidi Mohamed, seventh grader at Jefferson Middle School and her Art Teacher, Mr. Jim Dodson. High School Category winner Haley Campbell, ninth grader at Oak Ridge High School and her Art Teacher, Ms. Gisela Schrock.



## **Robertsville Middle School**

RMS 8<sup>th</sup> Grade Art students recently submitted their portfolios to the Oak Ridge High School Art department for review. Ten students did such an impressive job during their review that they were accepted into the Honors Art for high school. Congratulations to these amazing young artists!

## **Oak Ridge High School**

Dr. Deanna Pickel and Mrs. Jessica Williams, coordinators of the math thesis project at ORHS would like to congratulate Thesis 2 student, Imelia Markus-Brock, who won 1st place at the TN Jr. Science and Humanities Symposium! Imelia's talk was on using machine learning and reliably fit neutron reflectivity curves. She won a \$2,000 scholarship and a trip to Junior Science and Humanities Symposium Nationals in May.



# Oak Ridge Schools

OFFICE OF  
Finance Director

Telephone (865) 425-9004

---

---

## MEMORANDUM

**To:** Dr. Bruce Borchers, Superintendent of Schools  
**From:** Jenifer Van Dyke, Finance Director *JVD*  
**Subject:** **FY'24 Budget Transfer #2 & Budget Amendment #2**  
**Date:** February 26, 2024

The attached FY'24 Budget Transfer #2 & Budget Amendment #2 includes the following budget requests for Board of Education approval:

- Addition of \$450,000 to the General Fund (Fund 141) budget to establish a Grant Contingency for anticipated CRESO, Summer Learning, & ORPSEF grants. This budget amendment will be taken to the City of Oak Ridge in Spring 2024.
- Mid-Year adjustment & re-alignment of general fund salary, benefits, and expenditure budget items (budget/actual/encumbrances) based on YTD analysis.
- Place unencumbered budget funds into contracted services for growth planning, residential student placement needs, & interpreter needs.
- Place unencumbered budget funds into capital outlay expenditure account code for the Glenwood Safety Project & JMS Gym HVAC Replacement.
- Place unencumbered budget funds into multiple substitute lines for additional substitute needs.
- Place unencumbered budget funds into other accounts for Trustee Commissions, Accreditation Fees, Insurance Premiums, & Bank Fees.
- All routine budget transfers and revisions from October 17, 2023 through February 14, 2024 for Board Approval.

# FY 24 FYTD Budget Summary - Budget Transfer #2 & Amendment #2

Fund	FY24 Original Approved Budget	Budget Amendment #1 & #2	Budget Transfer #1 & #2	FY24 Revised & Amended Budget Amounts
Fund 141 (General Fund)	\$ 72,537,161.00	\$ 797,172.15	\$ (108,045.78)	\$ 73,226,287.37
Fund 142 (Federal)	\$ 5,087,614.00	\$ 2,277,596.47	\$ 108,045.78	\$ 7,473,256.25
Fund 143 (Food Service)	\$ 3,004,294.00			\$ 3,004,294.00
Fund 145 (Other Education)	\$ 155,021.00		\$ -	\$ 155,021.00
Fund 146 (Extended Child Care)	\$ 448,337.00			\$ 448,337.00
<b>TOTAL All Funds</b>	<b>\$ 81,232,427.00</b>	<b>\$ 3,074,768.62</b>	<b>\$ -</b>	<b>\$ 84,307,195.62</b>

## Fund 141 Budget Transfers

Fund 141 REVENUES	Account Number	Decrease	Increase
-------------------	----------------	----------	----------

<b>Establish State SPED PreK Grant</b>	141 R 44570 000 000 00000 000	\$ 97,883.45	\$ -
	141 R 46515 000 010 00000 000	\$ -	\$ 97,883.45

<b>Public Security Grant - Additional Allocation</b>	141 R 44570 000 000 00000 000	\$ 64,736.82	\$ -
	141 R 46980 000 044 00000 000	\$ -	\$ 64,736.82

Fund 141 EXPENDITURES	Account Number	Increase	Decrease
-----------------------	----------------	----------	----------

<b>Establish State SPED PreK Grant</b>	141 E 71200 116 010 00043 000	\$ 50,083.45	\$ -
	141 E 71200 163 010 00043 000	\$ 15,000.00	\$ -
	141 E 71200 201 010 00043 000	\$ 5,000.00	\$ -
	141 E 71200 204 010 00043 000	\$ 5,000.00	\$ -
	141 E 71200 207 010 00043 000	\$ 17,500.00	\$ -
	141 E 71200 208 010 00043 000	\$ 200.00	\$ -
	141 E 71200 210 010 00043 000	\$ 100.00	\$ -
	141 E 71200 212 010 00043 000	\$ 5,000.00	\$ -
	141 E 71900 599 000 00000 000	\$ -	\$ 97,883.45

<b>Transfer for SCA - CTE Renovation - Skilled Services</b>	141 E 76100 707 000 00000 412	\$ 19,630.00	\$ -
	141 E 72620 701 046 00000 000	\$ -	\$ 19,630.00

<b>Transfer for Rental Equipment</b>	141 E 72620 426 000 00000 000	\$ -	\$ 5,000.00
	141 E 72610 351 000 00000 000	\$ 5,000.00	\$ -

<b>Transfer for Purchase of Toro Outcross</b>	141 E 72620 717 000 00000 000	\$ 66,880.72	\$ -
	141 E 76100 707 000 00000 454	\$ -	\$ 66,880.72
<b>Public Security Grant - Additional Allocation</b>	141 E 72130 399 044 00000 000	\$ 64,736.82	\$ -
	141 E 71900 599 000 00000 000	\$ -	\$ 64,736.82
<b>Transfer for Furniture at JMS</b>	141 E 72210 196 000 00025 000	\$ -	\$ 6,000.00
	141 E 71100 711 000 00025 000	\$ 6,000.00	\$ -
	141 E 71100 449 000 00025 000	\$ -	\$ 4,034.00
	141 E 71100 711 000 00025 000	\$ 4,034.00	\$ -
<b>Transfer from JMS ISM Instructional Supplies to PD and from RMS ISM Instructional Supplies &amp; Equipment to Capital</b>	141 E 71300 429 023 00025 000	\$ -	\$ 10,000.00
	141 E 72130 524 023 00025 000	\$ 10,000.00	\$ -
	141 E 76100 399 023 00040 000	\$ 30,000.00	\$ -
	141 E 71300 429 023 00040 000	\$ -	\$ 10,000.00
	141 E 71900 730 023 00040 000	\$ -	\$ 20,000.00
<b>Budget Adjustment to State SPED Pre-K Grant to Match ePlan</b>	141 E 71200 116 010 00043 000	\$ -	\$ 2,000.00
	141 E 71200 206 010 00043 000	\$ 1,000.00	\$ -
	141 E 71200 299 010 00043 000	\$ 1,000.00	\$ -
<b>Transfer a Portion of LVT Salary to Consulting due to Staff Vacancy</b>	141 E 72250 308 000 00000 000	\$ 15,000.00	\$ -
	141 E 72250 121 000 00000 000	\$ -	\$ 15,000.00
<b>Budget Adjustment for Professional Development and Instructional Materials</b>	141 E 72210 196 000 00082 000	\$ -	\$ 1,500.00
	141 E 72210 524 000 00082 000	\$ 750.00	\$ -
	141 E 72210 429 000 00082 000	\$ 750.00	\$ -
<b>Budget Adjustment for Public School Security Grant</b>	141 E 72130 399 044 00000 000	\$ -	\$ 7,103.09
	141 E 72620 790 044 00000 000	\$ 7,103.09	\$ -

**Salary & Benefit Budget Adjustments due to  
Additional Duties, New Positions, Increased  
Contract Days, No Planning Period, and  
Educational Degrees Earned**

141 E 71100 116 000 00015 000	\$	5,987.00	\$	-
141 E 71100 204 000 00015 000	\$	538.83	\$	-
141 E 71100 201 000 00015 000	\$	371.19	\$	-
141 E 71100 212 000 00015 000	\$	86.81	\$	-
141 E 71100 116 000 00025 000	\$	5,935.00	\$	-
141 E 71100 204 000 00025 000	\$	534.15	\$	-
141 E 71100 201 000 00025 000	\$	367.97	\$	-
141 E 71100 212 000 00025 000	\$	86.06	\$	-
141 E 71100 116 000 00035 000	\$	13,374.00	\$	-
141 E 71100 204 000 00035 000	\$	1,203.66	\$	-
141 E 71100 201 000 00035 000	\$	829.19	\$	-
141 E 71100 212 000 00035 000	\$	193.93	\$	-
141 E 71100 116 000 00040 000	\$	14,781.00	\$	-
141 E 71100 204 000 00040 000	\$	1,330.29	\$	-
141 E 71100 201 000 00040 000	\$	916.42	\$	-
141 E 71100 212 000 00040 000	\$	214.32	\$	-
141 E 71100 116 000 00045 000	\$	2,410.00	\$	-
141 E 71100 204 000 00045 000	\$	216.90	\$	-
141 E 71100 201 000 00045 000	\$	149.42	\$	-
141 E 71100 212 000 00045 000	\$	34.95	\$	-
141 E 71100 116 000 00050 000	\$	2,959.00	\$	-
141 E 71100 204 000 00050 000	\$	266.31	\$	-
141 E 71100 201 000 00050 000	\$	183.46	\$	-
141 E 71100 212 000 00050 000	\$	42.91	\$	-
141 E 71200 116 000 00015 000	\$	5,426.00	\$	-
141 E 71200 204 000 00015 000	\$	488.34	\$	-
141 E 71200 201 000 00015 000	\$	336.41	\$	-
141 E 71200 212 000 00015 000	\$	78.68	\$	-
141 E 72410 104 000 00035 000	\$	3,013.00	\$	-
141 E 72410 204 000 00035 000	\$	271.17	\$	-
141 E 72410 201 000 00035 000	\$	186.81	\$	-
141 E 72410 212 000 00035 000	\$	43.69	\$	-
141 E 71100 116 000 00000 000	\$	-	\$	30,000.00
141 E 71900 599 000 00000 001	\$	-	\$	32,856.87

**Salary & Benefit Budget Adjustments due to  
Additional Duties, New Positions, Increased  
Contract Days, No Planning Period, and  
Educational Degrees Earned (cont.)**

141 E 71100 116 000 00035 000	\$	5,000.00	\$	-
141 E 71100 204 000 00035 000	\$	369.50	\$	-
141 E 71100 201 000 00035 000	\$	310.00	\$	-
141 E 71100 212 000 00035 000	\$	72.50	\$	-
141 E 71100 116 000 00035 000	\$	5,000.00	\$	-
141 E 71100 204 000 00035 000	\$	450.00	\$	-
141 E 71100 201 000 00035 000	\$	310.00	\$	-
141 E 71100 212 000 00035 000	\$	72.50	\$	-
141 E 71100 116 000 00045 000	\$	77,350.00	\$	-
141 E 71100 204 000 00045 000	\$	6,961.50	\$	-
141 E 71100 201 000 00045 000	\$	4,795.70	\$	-
141 E 71100 212 000 00045 000	\$	1,121.58	\$	-
141 E 71100 208 000 00045 000	\$	35.94	\$	-
141 E 71100 299 000 00045 000	\$	10.85	\$	-
141 E 71100 206 000 00045 000	\$	12.60	\$	-
141 E 71100 163 000 00045 000	\$	2,844.00	\$	-
141 E 71100 204 000 00045 000	\$	858.47	\$	-
141 E 71100 201 000 00045 000	\$	176.33	\$	-
141 E 71100 212 000 00045 000	\$	41.24	\$	-
141 E 71100 208 000 00045 000	\$	35.94	\$	-
141 E 71100 299 000 00045 000	\$	10.85	\$	-
141 E 71100 206 000 00045 000	\$	12.60	\$	-
141 E 71100 163 000 00050 000	\$	659.21	\$	-
141 E 71100 204 000 00050 000	\$	59.33	\$	-
141 E 71100 201 000 00050 000	\$	50.43	\$	-
141 E 71100 212 000 00050 000	\$	9.56	\$	-
141 E 71100 163 000 00000 000	\$	13,000.00	\$	-
141 E 71100 201 000 00000 000	\$	994.50	\$	-
141 E 71100 212 000 00000 000	\$	188.50	\$	-
141 E 72220 124 000 00000 000	\$	98,862.00	\$	-
141 E 72220 201 000 00000 000	\$	7,159.00	\$	-
141 E 72220 208 000 00000 000	\$	321.00	\$	-
141 E 72220 299 000 00000 000	\$	105.00		
141 E 72220 206 000 00000 000	\$	126.00	\$	-

141 E 71900 599 000 00000 000		\$	27,631.00
141 E 71900 599 000 00000 001	\$	-	\$ 199,755.63

<b>TOTAL</b>		\$	<b>782,631.85</b>	\$	<b>782,631.85</b>
--------------	--	----	-------------------	----	-------------------

**Fund 141 Budget Amendment**  
**To Be Presented to City Spring 2024**

<b>Fund 141 REVENUES</b>		<b>Account Number</b>	<b>Decrease</b>	<b>Increase</b>
<b>Establish Grant Contingency Budget</b>		141 R 46980 000 000 00000 000	\$ -	\$ 450,000.00
<b>Fund 141 EXPENDITURES</b>		<b>Account Number</b>	<b>Increase</b>	<b>Decrease</b>
<b>Establish Grant Contingency Budget</b>		141 E719000 599 000 00000 000	\$ 450,000.00	\$ -
<b>TOTAL</b>			<b>\$ 450,000.00</b>	<b>\$ 450,000.00</b>

## GENERAL FUND - Mid Year Salary, Benefit, & Expense Realignment

Fund 141 EXPENDITURES	Account Number	Increase	Decrease
<b>New Spending Requests</b>			
Other Contracted Services (Growth Planning/LeanFrog)	141-72310-399	\$ 34,000.00	
Substitutes for Nurses	141-72120-195	\$ 6,000.00	
Additional Interpreter Costs	141-72120-399	\$ 7,000.00	
Residential Student Placements	141-71100-399	\$ 20,000.00	
Trustee Commission	141-72310-510	\$ 15,000.00	
Cognia - Accreditation	141-72210-599---351	\$ 8,500.00	
Substitutes for Long Term Leave	141-72410-161---195	\$ 10,000.00	
Vehicle Insurance Premium	141-72710-511	\$ 200.00	
Additional Substitute Pay	141-71100-195	\$ 25,000.00	
Additional Bank Charge Fees	141-72510-599	\$ 3,000.00	
Chairs for Maintenance	141-72620-701	\$ 5,200.00	
Glenwood Safety Project	141-76100-707---450	\$ 41,500.00	
JMS Gym HVAC Replacement	141-76100-707---431	\$ 25,000.00	
		\$ -	
<b>TOTAL New Spending Requests</b>	<b>\$</b>	<b>200,400.00</b>	

### Payroll, Benefit, & Other Budgetary Changes: Based on current Budget to Actual vs Payroll Encumbrances on 1/30/24

<b>Regular Education Teachers</b>	141-71100-116		\$ (100,000.00)
Career Ladder	141-71100-117		\$ (4,000.00)
Educational Assistants Substitute	141-71100-163--195		\$ (10,000.00)
Educational Assistants	141-71100-163-000-00043		\$ (18,587.00)
Certified Substitute	141-71100-195	\$ 20,000.00	
Social Security	141-71100-201	\$ 40,000.00	\$ -
State Retirement	141-71100-204		\$ (200,000.00)
Life Insurance	141-71100-206	\$ 600.00	
Medical Insurance	141-71100-207		\$ (40,000.00)

Dental Insurance	141-71100-208		\$	(500.00)
Employer Medicare	141-71100-212	\$	10,000.00	\$ -
SRT State Retirement	141-71100-217	\$	6,000.00	
Vision Insurance	141-71100-299	\$	250.00	
<b>Alternative Education Teachers</b>	141-71150-116-00036		\$	(11,000.00)
Career Ladder	141-71150-117-00036		\$	(600.00)
Secretaries	141-71150-161-00036	\$	-	\$ (8,100.00)
Secretaries Substitute	141-71150-161-00036-195		\$	(1,000.00)
Educational Assistants	141-71150-163 -00036		\$	(21,000.00)
Educational Assistants Substitute	141-71150-163-00036-195		\$	(2,000.00)
Other Salaries & Wages	141-71150-189-00036	\$	1.00	
Certified Substitute	141-71150-195-00036	\$	7,000.00	
Social Security	141-71150-201-00036		\$	(750.00)
State Retirement	141-71150-204-00036		\$	(9,000.00)
Life Insurance	141-71150-206-00036		\$	(100.00)
Medical Insurance	141-71150-207-00036	\$	-	\$ (10,000.00)
Dental Insurance	141-71150-208-00036		\$	(200.00)
SRT State Retirement	141-71150-217-00036	\$	500.00	\$ -
Vision Insurance	141-71150-299-00036	\$	-	\$ (40.00)
<b>Special Education Teachers</b>	141-71200-116-00025		\$	(21,000.00)
Teachers	141-71200-116-00040		\$	(20,883.00)
Career Ladder	141-71200-117		\$	(2,000.00)
Educational Assistants	141-71200-163	\$	20,000.00	
Speech Pathologist	141-71200-171-00015	\$	4,583.00	
Social Security	141-71200-201	\$	7,500.00	
State Retirement	141-71200-204		\$	(50,000.00)
Medical Insurance	141-71200-207	\$	60,000.00	\$ -
Employer Medicare	141-71200-212	\$	1,800.00	

**Vocational Education**

Teachers	141-71300-116-00025		\$	(65,000.00)
Teachers	141-71300-116-00040		\$	(25,000.00)
Career Ladder	141-71300-117		\$	(1,000.00)
Educational Assistants Substitute	141-71300-163-00035-195		\$	(10,000.00)
Social Security	141-71300-201	\$	2,500.00	
State Retirement	141-71300-204		\$	(12,000.00)
Medical Insurance	141-71300-207	\$	12,000.00	
Employer Medicare	141-71300-212	\$	800.00	
SRT State Retirement	141-71300-217	\$	1,000.00	
Vision Insurance	141-71300-299	\$	6.00	

**Instructional Contingency**

	141-71900-000	\$	-	
Instructional Contingency - Salary/Benefit	141-71900-001	\$	-	\$ -
Instructional Contingency - Other	141-71900-002	\$	263,861.03	\$ -

**Health Services**

Supervisor/Director - CSH	141-72120-105--313	\$	7,260.00	
Medical Personnel	141-72120-131-00030		\$	(4,000.00)
Medical Personnel	141-72120-131-00045		\$	(3,000.00)
Overtime	141-72120-187		\$	(750.00)
Social Security	141-72120-201	\$	1,300.00	
State Retirement	141-72120-204		\$	(4,000.00)
Medical Insurance	141-72120-207	\$	200.00	
Employer Medicare	141-72120-212	\$	300.00	\$ -
SRT State Retirement	141-72120-217	\$	1,800.00	

**Other Student Support**

Other Salaries & Wages	141-72130-189	\$	-	\$ (500.00)
Social Security	141-72130-201	\$	2,900.00	
State Retirement	141-72130-204	\$	-	\$ (16,500.00)
Medical Insurance	141-72130-207		\$	(7,000.00)
Dental Insurance	141-72130-208	\$	-	\$ (50.00)
Employer Medicare	141-72130-212	\$	650.00	

Payments to Retirees	141-72130-213	\$	41,993.00	
SRT State Retirement	141-72130-217	\$	500.00	
Other Charges	141-72130-599	\$	4,500.00	
<b>Instructional Support</b>				
Director	141-72210-105	\$	1.00	
Librarian	141-72210129-00040			\$ (10,000.00)
Curriculum & Technology Integration Facilitators	141-72210-138	\$	425.00	\$ -
Secretaries	141-72210-161			\$ (2,000.00)
Social Security	141-72210-201	\$	8,000.00	\$ -
State Retirement	141-72210-204			\$ (35,000.00)
Medical Insurance	141-72210-207	\$	15,000.00	\$ -
Employer Medicare	141-72210-212	\$	2,500.00	\$ -
SRT State Retirement	141-72210-217	\$	1,000.00	
Other Charges	141-72210-599-001--306			\$ (80.00)
<b>Special Education Support</b>				
Medical Insurance	141-72220-207			\$ (2,000.00)
Dental Insurance	141-72220-212	\$	2,000.00	
<b>Technology Career Support</b>				
Secretaries	141-72230-161			\$ (4,000.00)
Social Security	141-72230-201	\$	500.00	
State Retirement	141-72230-204	\$	-	\$ (2,000.00)
Medical Insurance	141-72230-207			\$ (1,000.00)
Employer Medicare	141-72230-212	\$	150.00	
<b>Technology Services</b>				
Data Processing Personnel	141-72250-121			\$ (25,000.00)
Social Security	141-72250-201	\$	700.00	\$ -
State Retirement	141-72250-204			\$ (2,000.00)
Employer Medicare	141-72250-212	\$	500.00	\$ -
SRT State Retirement	141-72250-217			\$ (2,000.00)

**Adult Programs**

Other Salaries & Wages	141-72260-189	\$	23,540.00	
Social Security	141-72260-201	\$	1,470.00	
State Retirement	141-72260-204	\$	880.00	
Life Insurance	141-72260-206	\$	126.00	
Dental Insurance	141-72260-208	\$	360.00	
Employer Medicare	141-72260-212	\$	345.00	
SRT State Retirement	141-72260-217	\$	220.00	
Vision Insurance	141-72260-299	\$	109.00	

**Communications**

Social Security	141-72290-201	\$	30.00	
State Retirement	141-72290-204			\$ (1,000.00)

**Office of Superintendent**

Secretary	141-72320-161	\$	-	\$ (2,000.00)
Overtime	141-72320-187			\$ (1,000.00)
Social Security	141-72320-201	\$	500.00	
State Retirement	141-72320-204			\$ (3,750.00)
Life Insurance	141-72320-206	\$	150.00	
Medical Insurance	141-72320-207	\$	850.00	
Employer Medicare	141-72320-212	\$	75.00	
SRT State Retirement	141-72320-217	\$	450.00	\$ -

**Office of Principal Principals**

Career Ladder	141-72410-104-00030	\$	10,850.00	\$ -
Bookkeepers	141-72410-117	\$	1,000.00	\$ -
Assistant Principals	141-72410-119-00040	\$	1,570.00	
Secretary	141-72410-139	\$	8,000.00	
Secretary	141-72410-161			\$ (5,000.00)
Social Security	141-72410-201	\$	7,500.00	
State Retirement	141-72410-204			\$ (30,000.00)
Life Insurance	141-72410-206	\$	300.00	
Medical Insurance	141-72410-207	\$	25,000.00	
Dental Insurance	141-72410-208	\$	500.00	

Employer Medicare	141-72410-212	\$	2,000.00	
SRT State Retirement	141-72410-217			\$ (500.00)
Vision Insurance	141-72410-299	\$	200.00	
<b>Fiscal Services</b>				
Clerical Personnel	141-72510-161	\$	1.00	
Overtime	141-72510-187			\$ (500.00)
Social Security	141-72510-201	\$	1,000.00	
State Retirement	141-72510-204	\$	355.00	
Medical Insurance	141-72510-207	\$	500.00	
Dental Insurance	141-72510-208			\$ (50.00)
Employer Medicare	141-72510-212	\$	275.00	
SRT State Retirement	141-72510-217			\$ (250.00)
<b>Human Resources</b>				
Secretaries	141-72520-161	\$	1,000.00	
Other Salaries & Wages	141-72520-189	\$	95.00	
Social Security	141-72520-201	\$	200.00	
State Retirement	141-72520-204	\$	200.00	
Medical Insurance	141-72520-207	\$	350.00	
Dental Insurance	141-72520-208			\$ (20.00)
Employer Medicare	141-72520-212	\$	50.00	
SRT State Retirement	141-72520-217			\$ (150.00)
Vision Insurance	141-72520-299			\$ (2.00)
Software	141-72520-471			\$ (500.00)
<b>Operation of Plant</b>				
Secretaries	141-72610-161	\$	1.00	
Custodial Personnel	141-72610-166			\$ (15,000.00)
Social Security	141-72610-201	\$	8,500.00	\$ -
State Retirement	141-72610-204	\$	3,000.00	\$ -
Life Insurance	141-72610-206	\$	500.00	\$ -
Medical Insurance	141-72610-207			\$ (500.00)
Dental Insurance	141-72610-208	\$	400.00	

Employer Medicare	141-72610-212	\$	2,000.00	\$	-
SRT State Retirement	141-72610-217	\$	1,200.00	\$	-
Vision Insurance	141-72610-299	\$	180.00		
Other Supplies	141-72610-499-001--450			\$	(2.99)
<b>Maintenance of Plant</b>					
Supervisor/Director	141-72620-105	\$	1.00		
Secretaries	141-72620-161	\$	1.00		
Maintenance Personnel	141-72620-167	\$	-	\$	(35,000.00)
State Retirement	141-72620-204			\$	(2,000.00)
Medical Insurance	141-72620-207	\$	-	\$	(15,000.00)
Dental Insurance	141-72620-208			\$	(400.00)
SRT State Retirement	141-72620-217			\$	(2,000.00)
Vision Insurance	141-72620-299			\$	(100.00)
Equipment -Machinery Parts	141-72620-418-001			\$	(362.22)
<b>Capital Outlay</b>					
Building Improvements - Library Shelving	141-76100-707-001--429			\$	(0.17)
Building Improvements - Storage Building	141-76100-707-001--436			\$	(11,824.65)
<b>Preschool Program</b>					
Medical Personnel	141-73401-131	\$	1.00	\$	-
Secretaries	141-73401-161			\$	(500.00)
Educational Assistants	141-73401-163	\$	18,587.00	\$	-
Overtime	141-73401-187	\$	-	\$	(300.00)
Social Security	141-73401-201	\$	3,000.00	\$	-
Life Insurance	141-73401-206	\$	100.00	\$	-
Medical Insurance	141-73401-207	\$	13,000.00		
Dental Insurance	141-73401-208	\$	200.00		
Employer Medicare	141-73401-212	\$	750.00		
SRT State Retirement	141-73401-217			\$	(200.00)
Vision Insurance	141-73401-299	\$	100.00		
<b>TOTAL</b>			<b>\$ 892,552.03</b>	<b>\$</b>	<b>(892,552.03)</b>

## Fund 142 Budget Transfers

Fund 142 REVENUES	Account Code	Decrease	Increase
<b>Increase HQIM Literacy Budget</b>	142 R 47590 000 000 00000 000	\$ 20,000.00	\$ -
	142 R 47309 000 954 00000 000	\$ -	\$ 20,000.00

FUND 142 EXPENDITURES	Account Code	Increase	Decrease
<b>Adjust Carl Perkins Grant Budget</b>	142 E 71300 429 801 00000 000	\$ 5,000.00	\$ -
	142 E 71300 730 801 00000 000	\$ -	\$ 5,000.00
	142 E 72230 524 801 00000 000	\$ -	\$ 250.00
	142 E 99100 504 801 00000 000	\$ 250.00	\$ -

<b>Adjust Title IV Grant Budget</b>	142 E 72120 189 411 00000 000	\$ -	\$ 38,359.50
	142 E 72120 201 411 00000 000	\$ -	\$ 2,378.29
	142 E 72120 204 411 00000 000	\$ -	\$ 2,612.28
	142 E 72120 206 411 00000 000	\$ -	\$ 63.00
	142 E 72120 208 411 00000 000	\$ -	\$ 179.70
	142 E 72120 212 411 00000 000	\$ -	\$ 566.22
	142 E 72120 299 411 00000 000	\$ -	\$ 54.25
	142 E 72120 499 411 00000 000	\$ 6,000.00	\$ -
	142 E 72120 524 411 00000 000	\$ 25,000.00	\$ -
	142 E 72210 499 411 00000 000	\$ 6,213.24	\$ -
	142 E 72250 499 411 00000 000	\$ 4,000.00	\$ -
	142 E 72250 524 411 00000 000	\$ 3,000.00	\$ -

<b>Increase HQIM Literacy Budget</b>	142 E 71100 429 954 00000 000	\$ 20,000.00	\$ -
	142 E 71900 000 000 00000 000	\$ -	\$ 20,000.00

<b>TOTAL</b>		<b>\$ 89,463.24</b>	<b>\$ 89,463.24</b>
--------------	--	---------------------	---------------------



# Oak Ridge Schools

PRESCHOOL

Board of Education Approval  
T/TA (Training & Technical Assistance) Grant  
Preschool  
2024-2025

I respectfully request approval of the T/TA Plan for 2024-2025. This plan lays out how \$9,317 of T/TA Head Start funds will be utilized for our program throughout the 2024-2025 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

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

[www.ortn.edu](http://www.ortn.edu)

**Every student prepared for college, career, and life success**



**Oak Ridge Schools**  
PRESCHOOL

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 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.	ECLC, webinars, T/TA Network, Community Partners, WKU, or other sources	Family Service Staff	FCS Manager	SY 2024-2025	Provided by T/TA Network or community partners	
2) 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	ECLC, webinars, T/TA Network, Community Partners	Parents, FCS Manager, Family advocates, teaching staff	Director and FCS Manager	SY2024-2025	Provided by Program Staff	
3) 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 and Logic Facilitator	Teaching Staff; Parents	Education Coordinator	SY 2024-2025	\$2,000	
4) 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 ECLC	Families	FCS manager	SY2024-2025	Provided by Program Staff	
5) 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 2024-2025	\$250	
<b>Total to support Goal 1</b>									<b>\$2,250</b>

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 2024-2025	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 and/or during PLC's	Education Coordinator, Curriculum Coach	Teaching Staff	Education Coordinator	SY2024-2025	Provided by Program Staff	
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	Education Coordinator, Curriculum Coach	Teaching Staff	Education Coordinator	SY2024-2025	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 2024-2025	\$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 2024-2025	\$2,471	
6) Staff and parents will develop deeper understanding regarding diversity, equity, and inclusion	* Staff attend training * Parents attend training	Sign-in sheets, agendas	* Training opportunities	ECLC, Community Partners	All Staff and Parents	Director, Education Coordinator	SY 2024-2025	Provided by Program Staff and Community Partners	
7) 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 2024-2025	Provided by program staff	
<b>Total to Support Goal 2</b>									<b>\$2,971</b>

T/TA Plan 2024-2025  
 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 2024-2025	\$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 2024-2025	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 FIR data	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 2024-2025	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 2024-2025	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 2024-2025	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 12 Credit Union program staff	Families	FCS Manager	SY 2024-2025	Provided by Community Partners
<b>Total to support Goal 3</b>								<b>\$4,096</b>

T/TA Plan 2024-2025  
 Delegate: Oak Ridge Schools' Preschool/Head Start

Required Training	Resource	Target Audience	Expected Outcomes	Responsible Manager	Timeline	Estimated Cost
ChM 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 SY2024-2025	ORS District staff and certified trainer
<b>Additional Required Trainings:</b> <ul style="list-style-type: none"> <li>Childhood emergencies</li> <li>Health Policies</li> <li>Childhood safety</li> <li>Medication Administration procedures</li> <li>Poison Control</li> <li>Blood Borne Pathogen Control</li> <li>Food Allergies</li> </ul>	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 SY2024-2025	Program Staff or Oak Ridge Schools' Employee
<b>Identification and Reporting of Child Abuse &amp; Neglect:</b> <ul style="list-style-type: none"> <li>Definitions</li> <li>Laws/regulations</li> <li>Program policies/procedures</li> </ul>	Dept. of Children and Families & Prevent Child Abuse TN	All Staff	Staff will recognize and report any known and/or suspected child abuse and neglect according to laws and regulations	Compliance Manager	August 2024	Program Staff or Community Partners
Child Growth & Development for parents: <ul style="list-style-type: none"> <li>Planned learning activities discussed at parent meetings, parent/teacher conferences, workshops, and home visits</li> <li>Newsletters share information on several of these areas also:</li> </ul>	Management staff, community agencies, T/TA network	Parents and family members	Head Start parents/caregivers will increase their knowledge and confidence regarding child development and how to best meet their own child's needs	Family/Community Manager, Education Coordinator	SY2024-2025	Program Staff
Parent/Child Activities	Family Advocates and program staff	Children & Families	Parents will become more involved in child's education	FCS Manager	SY 2024-2025	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	SY2024-2025	Paid from Base Grant
<b>Total to support Required Head Start Training</b>						
<b>Required Training</b>	<b>Resource</b>	<b>Target Audience</b>	<b>Expected Outcomes</b>	<b>Responsible Manager</b>	<b>Timeline</b>	<b>Estimated Cost</b>
Head Start Education Training: <ul style="list-style-type: none"> <li>Classroom environment</li> <li>Child Development</li> <li>Assessment</li> <li>Discipline &amp; Guidance</li> <li>Literacy &amp; Handwriting</li> <li>Math -Science -Discovery</li> <li>Art &amp; Music</li> <li>Dramatic Play</li> <li>Cultural Diversity</li> <li>Health &amp; Wellness</li> <li>Special curricula</li> <li>Training on Head Start performance standards</li> </ul>	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	SY2024-2025	Provided by ORS and Program Staff
<b>Required Training, continued</b>	<b>Resource</b>	<b>Target Audience</b>	<b>Expected Outcomes</b>	<b>Responsible Manager</b>	<b>Timeline</b>	<b>Estimated Cost</b>
<ul style="list-style-type: none"> <li>Agency policies and procedures, including program philosophy</li> <li>Emergency Procedures</li> <li>Job Description</li> <li>Reporting requirements for suspected cases of child abuse and neglect</li> <li>Discipline policies -Policies for dismissal and reentry children</li> <li>Parent-Teacher Communication</li> <li>Disease Control</li> <li>Health Promotion</li> <li>Overview of Licensing Requirements</li> <li>Information on Risks (Infection, Stress, CMV)</li> </ul>	Admin. Staff	All Staff	Knowledgeable staff that follow program policies, Head Start Performance Standards and state licensure requirements	Director, Education Coordinator	SY 2024-2025	Provided by Program Staff and Community Partners
<ul style="list-style-type: none"> <li>24 Clock Hours of Training as follows:</li> <li>Six (6) hours (CPR/First Aid, CACFP, Childhood Food Allergies, Injury Control)</li> <li>Two(2) Hours in Identifying and reporting child abuse</li> <li>Ten (10) Hours of other related training (one to one consulting sessions, academic course, etc.) Supervision, parent communication,</li> <li>Six (6) hours Literacy</li> </ul>	Admin. Staff	All Staff	Knowledgeable staff that follow program policies, Head Start Performance Standards and state licensure requirements	Health Manager, and Education Coordinator	SY2024-2025	Provided by Program staff and Community Partners
<b>Total to support Required Training</b>						<b>\$0</b>
<b>Total T/TA Plan</b>						<b>9,317</b>

2/7/2024

	T/TA Plan	HS Budget Total	
	Head Start	Head Start	
	\$27,983.00	\$19,783.00 (Head Start)	
		\$9,098.00 (Delegate)	
		\$670.00 (Incidental)	
		\$29,551.00	
Total:	<u>\$27,983.00</u>	<u>\$29,551.00</u>	(\$1,568.00)

	T/TA Plan	EHS Budget Total	
	EHS		
	\$20,694.00	\$20,475.00 (EHS)	
		\$493.00 (Incidental)	
		\$20,968.00	
Total	<u>\$20,694.00</u>	<u>\$20,968.00</u>	(\$274.00)

2018-2019 T/TA Plan

	<b>Head Start</b>	<b>Early Head Start</b>
T/TA Goal # 1	\$1,590.00	\$3,310.00
T/TA Goal # 2	\$4,300.00	
T/TA Goal # 3	\$0.00	\$9,900.00
T/TA Goal # 4	\$12,443.00	\$4,855.00
Part 2 Required Training	\$1,450.00	\$1,690.00
Part 3 Required Training	\$0.00	\$0.00
Delegate Staff	\$9,098.00	
Incidental Funds	\$670.00	\$430.00
<b>Total</b>	<b>\$29,551.00</b>	<b>\$20,185.00</b>

	<b>HS Budget</b>	<b>EHS Budget</b>
Head Start	\$19,783.00	
Delegate	\$9,098.00	
Incidental Funds	\$670.00	\$430.00
Early Head Start		\$19,755.00
<b>Total</b>	<b>\$29,551.00</b>	<b>\$20,185.00</b>

**Differences**

HS/EHS Budget	\$29,551.00	\$20,185.00
T/TA Budget Plan	\$29,551.00	\$20,185.00
	\$0.00	\$0.00



# Oak Ridge Schools

Business Office

Telephone (865)425-9004  
Fax: (865)425-9060

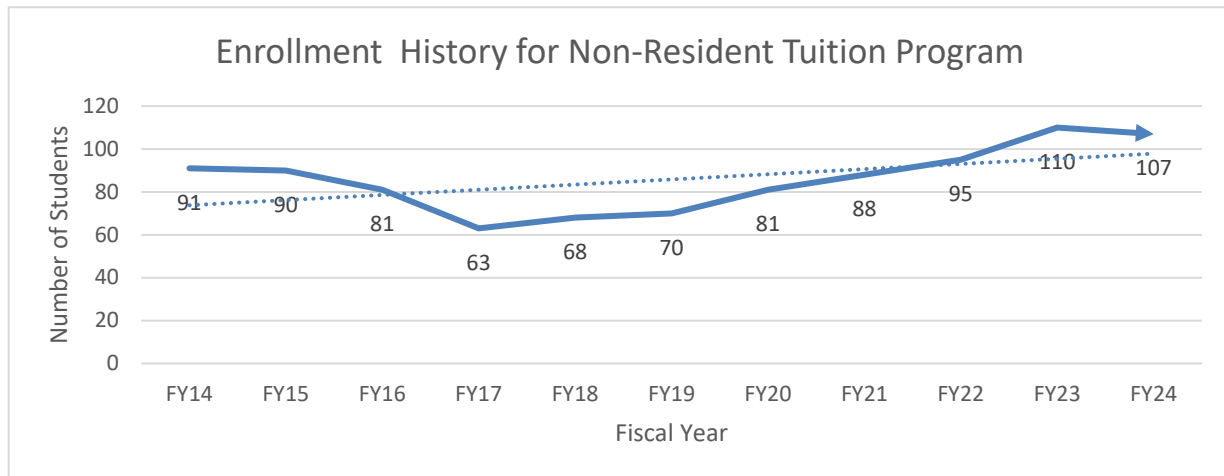
## Memorandum

**To:** Dr. Bruce Borchers, Superintendent  
**From:** Jenifer Van Dyke, Finance Director  
**Date:** March 7, 2023  
**Re:** Tuition Rates for 2024-2025 School Year

Board Policy 6.204 requires students who are not legal residents of Oak Ridge to pay tuition as approved annually by the Board of Education. A copy of the proposed tuition rates for the 2024-25 school year is attached. Non-resident tuition availability for FY25 will be determined by actual enrollment of resident students and capacity at each school.

The Non-Resident Tuition Statistics for 2023-24 School Year are as follows:

- **Total Tuition Students** 107
- **Tuition Revenue** \$322,251.05
- **Percentage by County:** 39% Anderson County; 24% Roane County; 30% Knox County; and 7% Other Tennessee Counties
- **Enrollment by Grade:** 56% Grades 7-12; 44% Grades K-6



Attachment: 2024-25 Tuition Rates



## Oak Ridge Schools

### Non-Resident Tuition Rates

### 2024-2025 School Year

		FY 2024	FY 2025
Anderson County Residents	Grades K-12	\$3,721	<b>\$3,600</b>
Roane County Residents	Grades K-12	\$3,721	<b>\$3,600</b>
Other Tennessee County Residents	Grades K-12	\$8,084	<b>\$8,162</b>
Out of State Residents	Grades K-12	\$13,718	<b>\$14,279</b>

\*\*Please refer to Board Policy 6.204 for information relating to employees and non-resident tuition rates.

#### Non-resident tuition rates - Calculation Details

Non-resident tuition rates for each school year for residents of **Roane and Anderson Counties** are calculated by adding prior year revenues received from the City of Oak Ridge & Federal Funds for Maintenance and Operations and dividing this total by the ADM for the prior year. The difference between the per pupil amount contributed to Oak Ridge Schools by Anderson and Roane Counties is added to the tuition rate for the county contributing the lesser amount.

Tuition rates for residents of **Tennessee outside of Anderson and Roane Counties** are calculated by adding prior year revenues received from Roane and Anderson Counties, the City of Oak Ridge, Federal Funds for Maintenance and Operations, and current tax revenue, and dividing this total by the ADM for the prior year.

Tuition for **out-of-state residents** is calculated THE SAME AS ABOVE EXCEPT THAT THE PRIOR YEAR BALANCE AND THE State revenue received by the Oak Ridge Schools is added to the total, prior to dividing by the ADM for the prior year.



# Oak Ridge

## SCHOOLS

Maintenance and Operations

### OFFICE OF MAINTENANCE AND OPERATIONS

**DATE: March 7, 2024**

**TO: Bruce Lay, Executive Director of School Leadership**

**FROM: Allen Thacker, Director of Maintenance and Operations**

**SUBJECT: District Annual Elevator Service Contract**

Mr. Lay,

I am recommending that the Oak Ridge Schools Board of Education approve the contract with United Elevator LLC of Knoxville TN for the annual service of district elevators in the amount of \$14,400.00. Services will include monthly inspection and repairs to all district elevators and lifts as required by the state elevator safety code. This contract will go into effect beginning FY 2025.

Funding for this purchase is from General Purpose School Fund - Other Contracted Services 72620 399. Bids were advertised in accordance with state guidelines and made available on the Oak Ridge Schools' website and Vendor Registry with only one vendor responding to the bid.

Thank you,

Allen Thacker

Director of Maintenance and Operations

**Maintenance Office**

100 Woodbury, Oak Ridge, TN 37830

(865) 425-3171

[www.ortn.edu](http://www.ortn.edu)

**Bid Form**

**page 1**

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

**Project:** Elevator & Lift Maintenance for ORS  
RFP 24-008

**Bid Opening:** 2:30 PM EST, March 7, 2024

**Company Name:** United Elevator Services, LLC

**Address:** PO Box 1308  
Knoxville, TN 37920

**Phone Number:** Office: 865-573-0731 Cell: 865-223-3909

**Email:** Shawnl@unitedelevator.com

**Signature:** \_\_\_\_\_

**Title:** Sales Representative-Knoxville Office

**Date:** March 5, 2024

**Main Bid:** *This Price is to be for the complete specified equipment and installation as outlined within this RFP 24-008. ALL COSTS ARE TO BE INCLUDED IN THE FINAL PRICE.*

**Bid Form**

**page 2**

The proposer shall use the Contractor Rate Table and the Elevator RFQ Fee Table to indicate the offered price for providing all services proposed, including all services as defined in the RFP Specifications. (The Bid Form includes these tables.)

**Contractor Rates as charges to the Owner:**

Regular per Hour Labor Rate	\$356.00
Overtime per Hour Labor Rate	\$604.00
Replacement Parts	Cost + <u>20</u> %

Please attach detailed specifications

Elevator RFQ Fee Table

School	Address	Elevator/ Lift	Monthly Service Charge	Quarterly Service Charge	Annual Testing Charge	5 Year Total Load Test
Oak Ridge High School	1450 Oak Ridge Turnpike Oak Ridge, TN 37830	Elevator 1	\$105.00		Included	
		Elevator 2	\$105.00		Included	
		Elevator 3	\$105.00		Included	
		Chair lift		\$180.00	Included	
Robertsville Middle School	245 Robertsville Rd Oak Ridge, TN 37830	Elevator 1	\$105.00		Included	
Jefferson Middle School	200 Fairbanks Rd Oak Ridge, TN 37830	Elevator 1	\$105.00		Included	
Willow Brook Elementary School	298 Robertsville Rd Oak Ridge, TN 37830	Elevator 1	\$105.00		Included	
Glenwood Elementary School	125 Audubon Rd Oak Ridge, TN 37830	Elevator 1	\$105.00		Included	
Linden Elementary School	700 Robertsville RD Oak Ridge, TN 37830	Elevator 1 Chair lift	\$105.00	\$180.00	Included	
		<b>Totals</b>	<b>\$ 840.00</b>	<b>\$ 360.00</b>	<b>\$ 0.00</b>	
			Grand Total of Monthly Service, Quarterly Service, and Annual Testing		\$ 1,200.00	

HOLD HARMLESS AGREEMENT

This Hold Harmless Agreement is between United Elevator Services, LLC  
Name of Contractor

(Hereinafter Contractor), and Oak Ridge Schools named in this bld.

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

Name of Contractor: United Elevator Services, LLC

By: Kent Solberg

Title: General Manager

STATE OF Tennessee

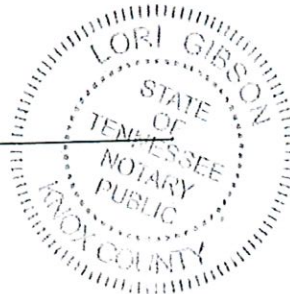
County of Knox

Kent Solberg personally appeared before me, the undersigned, with whom I am personally acquainted and who, upon oath, acknowledged that he/she/it executed the within instrument for the purposes therein contained, and who further acknowledge that he/she/it is authorized to execute this Interment on behalf of United Elevator Services, LLC

Signature

Witness by hand and Notaries seal at office this 20 day of February,  
year of 2024.

Lori Gibson  
Notary Public  
My Commission Expires: July 6, 2024



NON-COLLUSION AFFIDAVIT

NON-COLLUSION AFFIDAVIT TO BE EXECUTED  
BY DESIGN-BUILDER

State of Tennessee

County of Knox

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

Subscribed and sworn to (or affirmed) before me this 20 day

of February, 2024.

[Signature]

Signature of Officer

[Signature]

Notary Signature

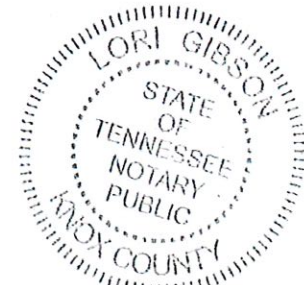
Kent Solberg

Typed Name of Officer

General manager

Office

Notary Seal



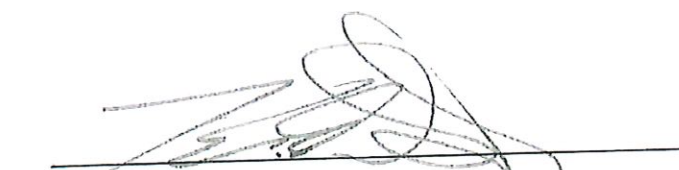
WARNING! PROPOSALS WILL NOT BE CONSIDERED UNLESS THIS AFFIDAVIT IS COMPLETED AND EXECUTED, INCLUDING THE AFFIDAVIT OF THE NOTARY AND THE NOTORIAL SEAL.

IRAN DIVESTMENT ACT REQUIREMENTS

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

CERTIFICATION

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

  
\_\_\_\_\_  
Signature

Kent Solberg  
\_\_\_\_\_  
Printed Name

United Elevator Services, LLC  
\_\_\_\_\_  
Name of Firm/Company

02/20/2024  
\_\_\_\_\_  
Date

General Manager  
\_\_\_\_\_  
Title

\*[https://tn.gov/assets/entities/generalservices/cpo/attachments/List\\_of\\_persons\\_pursuant\\_to\\_Tenn\\_Co\\_de\\_An\\_n\\_12-12-106\\_Iran\\_Divestment\\_Act-July.pdf](https://tn.gov/assets/entities/generalservices/cpo/attachments/List_of_persons_pursuant_to_Tenn_Co_de_An_n_12-12-106_Iran_Divestment_Act-July.pdf)

CRIMINAL BACKGROUND COMPLIANCE AFFIDAVIT

STATE OF Tennessee

COUNTY OF Knox

The undersigned, principal officer of United Elevator Services, LLC, an Employer contracting with the Oak Ridge School Board of Education to provide services having direct contact with children or access to grounds of an Oak Ridge public school while students are on grounds, hereby states under oath as follows:

1. The undersigned is a principal officer of \_\_\_\_\_ (hereafter referred to as the "Company") and is duly authorized to execute this Affidavit on behalf of the Company.
2. The Company submits this Affidavit pursuant to T.C.A. § 49-5-413 as amended effective September 1, 2007, for entities entering into contracts with a local board of education where the Company's employees will have direct contact with school children or access to the grounds of a school when children are present. It is the duty of the Company to require applicants supply a fingerprint sample and submit to a criminal history records check to be conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the person to have contact with such children or enter school grounds and to take certain other actions based upon the results of the records check.
3. The Company is in compliance with the terms of T.C.A. § 49-5-413.

Further affiant saith naught.  
Principal Officer

STATE OF Tennessee

COUNTY OF Knox

Before me personally appeared  Kent Solberg with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the GM of \_\_\_\_\_ and is authorized to execute this instrument on behalf of the principal for the purposes therein contained.

Witness my hand and seal at office this 20 day of February

20 24  
Notary Public Lou Gibson  
My commission expires: July 16, 2024



**DRUG-FREE WORKPLACE AFFIDAVIT**

STATE OF Tennessee

COUNTY OF Knox

The undersigned, principal officer of United Elevator Services, LLC, an employer of five (5) or more employees contracting with Oak Ridge School District to provide construction services, hereby states under oath as follows:

1. The undersigned is a principal officer of United Elevator Services, LLC (hereafter referred to as the "Company") and is duly authorized to execute this Affidavit on behalf of the Company.
2. The Company submits this Affidavit pursuant to T.C.A. § 50-9-113 which requires each employer with no less than five (5) employees receiving pay who contracts with the state or any local government to provide construction services to submit an affidavit stating that such employer has a drug-free workplace program that complies with Title 50, Chapter 9, of the Tennessee Code Annotated.
3. The Company is in compliance with the terms of T.C.A. § 50-9-113.

Further affiant saith naught.

Principal Officer

STATE OF Tennessee

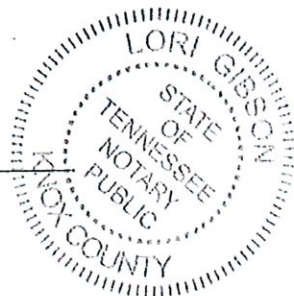
COUNTY OF Knox

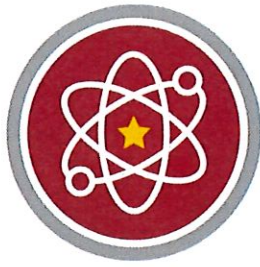
Before me personally appeared Kent Solberg with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the General Manager of United Elevator Services, LLC and is authorized to execute this instrument on behalf of the principal for the purposes therein contained.

Witness my hand and seal at office this 20 day of February, 2024.

Lori Gibson  
Notary Public

My Commission Expires: July 6, 2024





# Oak Ridge

SCHOOLS

Maintenance and Operations

## OFFICE OF MAINTENANCE AND OPERATIONS

**DATE: March 7, 2024**

**TO: Bruce Lay, Executive Director of School Leadership**

**FROM: Allen Thacker, Director of Maintenance and Operations**

**SUBJECT: District Annual Waste Container Services**

Mr. Lay,

I am recommending that the Oak Ridge Schools Board of Education approve the contract with Waste Connections of Tennessee of Knoxville TN in the amount of \$44,201.88 for service of the district waste containers. This contract will go into effect beginning FY 2025.

Funding for this purchase is from General Purpose School Fund – Disposal Fees 72610 359. Bids were advertised in accordance with state guidelines and made available on the Oak Ridge Schools' website and Vendor Registry with three vendors responding to the bid.

Thank you,

Allen Thacker

Director of Maintenance and Operations

***Maintenance Office***

100 Woodbury, Oak Ridge, TN 37830

(865) 425-3171

[www.ortn.edu](http://www.ortn.edu)



Business

Department

School Administration Building  
304 New York Ave  
Oak Ridge, Tennessee 37830  
Phone (865) 425-9005  
Fax (865) 425-9060

## Request for Proposal

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

The Oak Ridge Schools Board of Education is soliciting proposals **Waste Container Services for the district – RFP 24-007.**

### *General Requirements:*

Proposals, bids, or responses will be accepted by the Oak Ridge Schools Business Department no later than **2:00 PM EST, March 7, 2024.** Every document must be enclosed in an envelope clearly marked as a bid document. Two full copies of the proposal must be submitted each with original signatures on both Bid Forms (included in this packet). Any response, bid, or proposal received after the above deadline shall be considered late, and will not be opened or considered. Bid prices must be valid for no less than sixty (60) days from the date of the bid.

All documents shall be submitted to the following address:

Mary Ann Riley, Purchasing Specialist  
Re: Waste Container Services  
(RFP 24-007)  
Oak Ridge Schools  
304 New York Ave  
Oak Ridge, TN 37830

**General Specifications:**

- Containers are to be furnished and maintained by the Contractor. Any variations of containers such as but not limited to size must be noted.
- Contractor will change out containers on an annual basis or provide an annual cleaning service for each container.
- Contractor will provide repair service for any damage to doors/lids that do not close properly within 48 hours of being notified.
- All container enclosure gates will be properly closed and secured after each service.
- Any reduction in the number of scheduled trash pickups by the Contractor will be credited against additional trash pickups requested by the District. The daily schedule is defined as five (5) pickups per week (one each weekday) except as modified by the holiday schedule or scheduled breaks.
- Contractor will provide the method or schedule used for calculating the fuel and mileage charges.
- Contractor to submit unit costs for "Additional Services" which shall include the following:
  - One additional weekday pickup of one (1) container at any single location
  - One additional weekend or evening pickup at any single location
  - One additional container added at any single location
- Contractor must provide a written description of any variations or exceptions to the above schedule included in the bid amount. No changes will be made during the term of the contract without written approval from the District.
- Any agreement between the selected Contractor and the District may be cancelled by either party upon submission of written notification thirty (30) days in advance of termination of services. Failure by the Contractor to provide the scheduled services for three (3) consecutive weekdays may result in termination of any obligation to the Contractor on the part of the District.
- Invoices to and payments by the District shall be made monthly
- The contract is for one (1) year and the District reserves the right to extend the contract annually for five (5) years.
- Charges for additional services must be itemized and payments for such services will be added to the regular monthly payment.
- No trash service is required on the following holidays:

Labor Day	Christmas Day	Independence Day
Thanksgiving Thursday	New Years Eve	Good Friday
Thanksgiving Friday	New Years Day	Memorial Day
Christmas Eve	Martin Luther King Day	

- Contractor must provide a written description of any restrictions regarding use of containers as to type, size, weight, etc. of trash or debris placed in the containers. (Attach with you your bid response)
- Contractor will provide and add alternate proposal for providing single stream recycling services in addition to the waste removal services.
- Proposal will include the cost of receptacles, pick-up, and removal on a 1 x per week basis.
- Contractor will provide a designated customer service contact to resolve issues in a timely manner.
- Contractor must make every attempt to maintain a standardized schedule of service.

**Locations, Container Sizes, and Pickup Dates/Times:**

BUILDING	LOCATION/ADDRESS	WEEKLY SERVICE	MONTHLY COST
School Administration Building	304 New York Ave	1 – 6 yd - Daily	\$ 127.22
Glenwood Elementary	125 Audubon	1 – 8 yd – T/Th	\$ 234.50
Glenwood Cafeteria		1 – 6 yd – Daily	\$ 127.22
Linden Elementary	700 Robertsville Rd	1 – 8 yd – Daily	\$ 152.15
Linden Recycling		1 – 8 yd – F	\$ 152.15
Willow Brook Elementary	298 Robertsville Rd	1 – 6 yd – M/W/F	\$ 268.75
Willow Brook Cafeteria		1 – 6 yd - Daily	\$ 127.22
Woodland Elementary	168 Manhattan Ave	1 – 6 yd – M/W/F	\$ 268.95
Woodland Elementary Cafeteria		1 – 6 yd - Daily	\$ 127.22
Jefferson Middle School	200 Fairbanks Rd	1 – 6 yd – M/W/F	\$ 268.95
Jefferson Middle Cafeteria		1 – 6 yd - Daily	\$ 127.22
Robertsville Middle School	245 Robertsville Rd	1 – 8 yd – T/Th	\$ 234.50
Robertsville Middle Cafeteria		1 – 6 yd - Daily	\$ 127.22
Robertsville Recycling		1 – 8 yd - F	\$ 152.15
Oak Ridge High School	127 Providence Rd	1 – 6 yd – T/Th	\$ 198.05
ORHS Gym		1 – 6 yd - Daily	\$ 127.22
ORHS Cafeteria		1 – 6 yd - Daily	\$ 127.22
ORHS – Secret City Academy		1 – 6 yd – T/Th	\$ 198.05
ORHS – Recycling @ Cafeteria		1 – 8 yd - F	\$ 152.15
ORHS – Recycling	127 Providence Rd	1 – 8 yd - F	\$ 152.15
Oak Ridge Preschool	157 Carver Ave	1 – 6 yd - Daily	\$ 127.22
Blankenship Field	144 Broadway Ave	1 – 8 yd – Will Call	\$ 105.75

**Submission Requirements:**

1. A detailed bid form, which includes quantity and unit cost must be included in the bid package. Please include specification sheets on all products/terms.
2. Two full copies of the proposal must be submitted, with original Bid Forms included with each copy.
3. A detailed description of all warranties and support for equipment and software must be included.
4. Any renewal costs (if any) shall be included in notes on the Bid Form. Specifically, anticipated annually recurring costs for maintenance, support, and upgrades, if any, must be listed.
5. The amount listed on the Bid Form should reflect the total implementation costs of this project as submitted.
6. A copy of your W-9 should be included with bid documents.
7. Any questions should be directed to Mary Ann Riley via email: [orspurchasing@ortn.edu](mailto:orspurchasing@ortn.edu)
8. References are required of those bidders who have NOT done business with Oak Ridge Schools. Please submit references on a separate sheet with business name, address, phone number and contact name if known.

**Schedule:**

1. **The contract for bid services will begin July 1, 2024. The school year runs from July 1, 2024 to June 30, 2025.**
2. Sealed bids will be opened at the School Administration Building, 304 New York Avenue, Oak Ridge, TN 37830 at **2:00 PM EST March 7, 2024.**

## Bidding Procedures

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

Mary Ann Riley,  
Purchasing Specialist  
Waste Container Services  
RFP 24-007  
304 New York Ave.  
Oak Ridge, TN 37830

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

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

**Criminal Background Compliance:** Bidders shall be required to complete the attached Criminal Background Compliance Affidavit Form in compliance with the provisions of Tennessee Code Annotated 49-5-413.

**EDGAR Certification:** The EDGAR certifications and provisions are required and applied when Oak Ridge Schools expends federal funds for any contract resulting from this procurement process. Pursuant to 2 C.F.R. § 200.326, all contracts, including small purchases, awarded by the District and the District's subcontractors shall contain the procurement provisions of Appendix II to Part 200, as applicable.

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

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

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

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

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

**Non-Boycott of Israel Affidavit:** Concerning the Non-Boycott of Israel Act (TCA 12-4-1 et seq.), by submission of this bid/quote/proposal, each supplier and each person signing on behalf of any supplier certifies, and in the case of a joint bid/quote/proposal, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each supplier is not boycotting Israel pursuant to TCA 12-4-1 and will not during the term of any award. Note: Applicable only to contracts of \$250,000 or more and to suppliers with 10 or more employees.

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

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

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

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

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

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

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

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

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

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

**Bid Form**

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

Project: **Waste Container Services**  
**RFP 24-007**

Bid Opening: **2:00 PM EST, March 7, 2024**

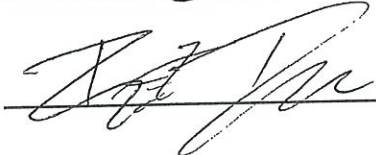
Company Name: WASTE CONNECTIONS OF TN, INC

Address: 2400 Chipman St

Knoxville, TN 37917

Phone Number: 865-522-8161

Email: BRETT@WCNXTN.COM

Signature: 

Title: DSM OF WCN OF TN, INC

Date: 2/16/2024

Main Bid: *Please fill out the following page and return a copy with your proposal.*

Bid Amount: TOTAL COST \$ 3,683.<sup>49</sup> Per Month USD

Please attach detailed specifications.

PLEASE FILL OUT THIS PAGE AND RETURN A COPY WITH YOUR PROPOSAL.

Locations, Container Sizes, and Pickup Dates/Times:

BUILDING	LOCATION/ADDRESS	WEEKLY SERVICE	MONTHLY COST
School Administration Building	304 New York Ave	1 - 6 yd - Daily	127. <sup>22</sup>
Glenwood Elementary	125 Audubon	1 - 8 yd - T/Th	234. <sup>50</sup>
Glenwood Cafeteria		1 - 6 yd - Daily	127. <sup>22</sup>
Linden Elementary	700 Robertsville Rd	1 - 8 yd - Daily	152. <sup>15</sup>
Linden Recycling		1 - 8 yd - F	152. <sup>15</sup>
Willow Brook Elementary	298 Robertsville Rd	1 - 6 yd - M/W/F	268. <sup>95</sup>
Willow Brook Cafeteria		1 - 6 yd - Daily	127. <sup>22</sup>
Woodland Elementary	168 Manhattan Ave	1 - 6 yd - M/W/F	268. <sup>95</sup>
Woodland Elementary Cafeteria		1 - 6 yd - Daily	127. <sup>22</sup>
Jefferson Middle School	200 Fairbanks Rd	1 - 6 yd - M/W/F	268. <sup>95</sup>
Jefferson Middle Cafeteria		1 - 6 yd - Daily	127. <sup>22</sup>
Robertsville Middle School	245 Robertsville Rd	1 - 8 yd - T/Th	234. <sup>50</sup>
Robertsville Middle Cafeteria		1 - 6 yd - Daily	127. <sup>22</sup>
Robertsville Recycling		1 - 8 yd - F	152. <sup>15</sup>
Oak Ridge High School	127 Providence Rd	1 - 6 yd - T/Th	198. <sup>00</sup>
ORHS Gym		1 - 6 yd - Daily	127. <sup>22</sup>
ORHS Cafeteria		1 - 6 yd - Daily	127. <sup>22</sup>
ORHS - Secret City Academy		1 - 6 yd - T/Th	198. <sup>00</sup>
ORHS - Recycling @ Cafeteria		1 - 8 yd - F	152. <sup>15</sup>
ORHS - Recycling	127 Providence Rd	1 - 8 yd - F	152. <sup>15</sup>
Oak Ridge Preschool	157 Carver Ave	1 - 6 yd - Daily	127. <sup>22</sup>
Blankenship Field	144 Broadway Ave	1 - 8 yd - Will Call	105. <sup>75</sup>

TOTAL: \$ 3,683.<sup>49</sup> \*

\*Please be sure to include all costs of implementation in the total (any surcharges, charges to be incurred, etc.).

**HOLD HARMLESS AGREEMENT**

This Hold Harmless Agreement is between Waste Connections of TN, Inc

Name of Contractor

(Hereinafter Contractor), and Oak Ridge Schools named in this bid.

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

Name of Contractor: Waste Connections of TN, Inc

By: Brett Taylor

Title: DSM WCI OF TN

STATE OF Tennessee

County of Knox

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

Waste Connections of TN., Inc.

[Signature]  
Signature 3/5/24

Witness by hand and Notaries seal at office this 23 day of February year of 2024.

[Signature]  
Notary Public

My Commission Expires: 6 Jul 24

NON-COLLUSION AFFIDAVIT

NON-COLLUSION AFFIDAVIT TO BE EXECUTED  
BY CONTRACTOR

State of Tennessee

County of KNOX

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

Subscribed and sworn to (or affirmed) before me this 23 day

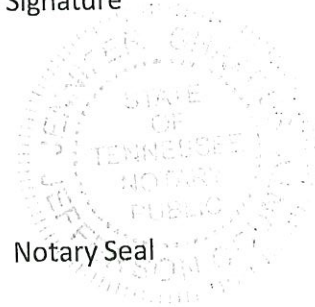
of January, 2024.

Brett Taylor  
Signature of Officer

Jennifer Shuader  
Notary Signature

BRETT TAYLOR  
Typed Name of Officer

Waste Connections of TN, INC  
Office



Notary Seal

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

## IRAN DIVESTMENT ACT REQUIREMENTS

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

### CERTIFICATION

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

  
\_\_\_\_\_  
Signature

2/20/24  
\_\_\_\_\_  
Date

Brett Taylor  
\_\_\_\_\_  
Printed Name

DSM WCI of TN, Inc  
\_\_\_\_\_  
Title

Waste Connections of TN, Inc  
\_\_\_\_\_  
Name of Firm/Company

\*[https://tn.gov/assets/entities/generalservices/cpo/attachments/List\\_of\\_persons\\_pursuant\\_to\\_Tenn\\_Code\\_An\\_n\\_12-12-106.\\_Iran\\_Divestment\\_Act-July.pdf](https://tn.gov/assets/entities/generalservices/cpo/attachments/List_of_persons_pursuant_to_Tenn_Code_An_n_12-12-106._Iran_Divestment_Act-July.pdf)

**CRIMINAL BACKGROUND COMPLIANCE AFFIDAVIT**

STATE OF Tennessee

COUNTY OF Knox

The undersigned, principal officer of WCI of TN, INC., an Employer contracting with the Oak Ridge School Board of Education to provide services having direct contact with children or access to grounds of an Oak Ridge public school while students are on grounds, hereby states under oath as follows:

1. The undersigned is a principal officer of WCI of TN, INC. (hereafter referred to as the "Company") and is duly authorized to execute this Affidavit on behalf of the Company.
2. The Company submits this Affidavit pursuant to T.C.A. § 49-5-413 as amended effective September 1, 2007, for entities entering into contracts with a local board of education where the Company's employees will have direct contact with school children or access to the grounds of a school when children are present. It is the duty of the Company to require applicants supply a fingerprint sample and submit to a criminal history records check to be conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the person to have contact with such children or enter school grounds and to take certain other actions based upon the results of the records check.
3. The Company is in compliance with the terms of T.C.A. § 49-5-413.

Further affiant saith naught.  
Principal Officer

STATE OF Tennessee

COUNTY OF Knox

Before me personally appeared BRETT TAYLOR with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the DSM of WCI of TN, INC. and is authorized to execute this instrument on behalf of the principal for the purposes therein contained.

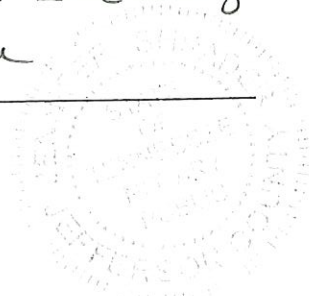
Witness my hand and seal at office this 23 day of February

20 24

Notary Public

My commission expires:

Jennifer Stuebe  
regularly



**DRUG-FREE WORKPLACE AFFIDAVIT**

STATE OF Tennessee

COUNTY OF Knox County

The undersigned, principal officer of WCI OF TN, INC, an employer of five (5) or more employees contracting with Oak Ridge School District to provide construction services, hereby states under oath as follows:

1. The undersigned is a principal officer of Waste Connections of TN, INC (hereafter referred to as the "Company") and is duly authorized to execute this Affidavit on behalf of the Company.
2. The Company submits this Affidavit pursuant to T.C.A. § 50-9-113 which requires each employer with no less than five (5) employees receiving pay who contracts with the state or any local government to provide construction services to submit an affidavit stating that such employer has a drug-free workplace program that complies with Title 50, Chapter 9, of the Tennessee Code Annotated.
3. The Company is in compliance with the terms of T.C.A. § 50-9-113.

Further affiant saith naught.

Principal Officer: [Signature]

STATE OF Tennessee

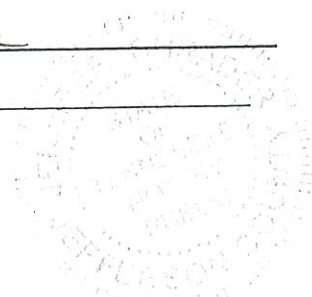
COUNTY OF KNOX

Before me personally appeared Brett Taylor with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the DSM of Waste Connections of TN, Inc and is authorized to execute this instrument on behalf of the principal for the purposes therein contained.

Witness my hand and seal at office this 23<sup>rd</sup> day of February, 2024.

Notary Public: [Signature]

My commission expires 6 Jul 24



## Brett Taylor

---

**From:** ORS Purchasing <orspurchasing@ortn.edu>  
**Sent:** Friday, February 9, 2024 9:23 AM  
**To:** Brett Taylor  
**Subject:** RE: [EXTERNAL] RFP - 24-007 ( Waste Container Services - Oak Ridge BOE)

---

### This Message Is From an Untrusted Sender

You have not previously corresponded with this sender.

Brett,

I have sent your question off to be answered by our Maintenance Department. He responded that he wanted to review and get back to me on Monday. Will that work with you?

Thanks,  
Mary Ann

*Mary Ann Riley*  
*Oak Ridge Schools Purchasing*  
304 New York Ave.  
Oak Ridge, TN 37830  
865-425-9005  
[orspurchasing@ortn.edu](mailto:orspurchasing@ortn.edu)  
[mriley@ortn.edu](mailto:mriley@ortn.edu)

---

**From:** Brett Taylor <Brett.Taylor@WasteConnections.com>  
**Sent:** Thursday, February 8, 2024 5:38 PM  
**To:** ORS Purchasing <orspurchasing@ortn.edu>  
**Subject:** Re: [EXTERNAL] RFP - 24-007 ( Waste Container Services - Oak Ridge BOE)

**WARNING: This email originates from an external source. Do not open any links or attachments unless you recognize and trust the sender. Click the 'Report Phishing' button above if this message is suspicious.**

Mary Ann,

Would the schools and locations be okay with Cardboard Only 8yds?

Brett Taylor  
Waste Connections TN/ KY  
District Sales Leader  
865-258-3570  
[Brett@wasteconnections.com](mailto:Brett@wasteconnections.com)

Sent from iPhone

---

**From:** ORS Purchasing <orspurchasing@ortn.edu>  
**Sent:** Thursday, February 8, 2024 2:20 PM

To: Brett Taylor <[Brett.Taylor@WasteConnections.com](mailto:Brett.Taylor@WasteConnections.com)>  
Subject: RE: [EXTERNAL] RFP - 24-007 ( Waste Container Services - Oak Ridge BOE)

Hi Brett,

To answer the first question, the containers needed are for single stream recycling.

As for the provision that you would like to add, yes, that will be ok.

I have highlighted our answers to your specific email below.

Thanks,  
Mary Ann

*Mary Ann Riley*  
*Oak Ridge Schools Purchasing*  
304 New York Ave.  
Oak Ridge, TN 37830  
865-425-9005  
[orspurchasing@ortn.edu](mailto:orspurchasing@ortn.edu)  
[mriley@ortn.edu](mailto:mriley@ortn.edu)

---

From: Brett Taylor <[Brett.Taylor@WasteConnections.com](mailto:Brett.Taylor@WasteConnections.com)>  
Sent: Thursday, February 8, 2024 8:53 AM  
To: ORS Purchasing <[orspurchasing@ortn.edu](mailto:orspurchasing@ortn.edu)>  
Subject: [EXTERNAL] RFP - 24-007 ( Waste Container Services - Oak Ridge BOE)

**WARNING: This email originates from an external source. Do not open any links or attachments unless you recognize and trust the sender. Click the 'Report Phishing' button above if this message is suspicious.**

Mary Ann,

Waste Connections had a question on the Recycling containers needed for the Oak Ridge School bid. Are those containers for Old Corrugated Cardboard or Single Stream Recycling?

Also is Oak Ridge School okay with adding the provision in for misses that covers the following in the RFP instead of the (3 consecutive weekdays) YES

**\* EXCUSED PERFORMANCE**

Except for the payment of amounts owed hereunder, neither party hereto shall be liable for its failure to perform or delay in its performance hereunder due to contingencies beyond its reasonable control including, but not limited to, strikes, riots, compliance with laws or governmental orders, inability to access a container, fires, inclement weather and acts of God, and such failure shall not constitute a breach under this Agreement. For the avoidance of doubt, however, a law or government order, ordinance or award establishing an exclusive franchise or similar right for a service provider in Contractor's service area shall not excuse Customer's performance hereunder.

**Brett Taylor**  
District Sales Manager

Waste Connections of TN/KY  
[Brett@wasteconnections.com](mailto:Brett@wasteconnections.com)  
(865)258-3570 - CELL  
<https://www.wasteconnections.com/knoxville/>

# RELATIONSHIPS & RESULTS



# Request for Taxpayer Identification Number and Certification

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

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

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Waste Connections of Tennessee, Inc.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

- Individual/sole proprietor or single-member LLC
- C Corporation  S Corporation  Partnership  Trust/estate
- Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ \_\_\_\_\_
- Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.
- Other (see instructions) ▶ \_\_\_\_\_

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) \_\_\_\_\_

Exemption from FATCA reporting code (if any) \_\_\_\_\_

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.

2400 Chipman Street

6 City, state, and ZIP code

Knoxville, TN 37917

7 List account number(s) here (optional)

Requester's name and address (optional)

Print or type. See Specific Instructions on page 3.

## Part I Taxpayer Identification Number (TIN)

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

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

Social security number

				-						
--	--	--	--	---	--	--	--	--	--	--

or

Employer identification number

2	5	-	1	8	2	2	7	7	1
---	---	---	---	---	---	---	---	---	---

## Part II Certification

Under penalties of perjury, I certify that:

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

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

Sign Here

Signature of U.S. person



Date ▶ 2-11-19

## General Instructions

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

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

## Purpose of Form

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

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
  - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
  - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
  - Form 1099-S (proceeds from real estate transactions)
  - Form 1099-K (merchant card and third party network transactions)
  - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
  - Form 1099-C (canceled debt)
  - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

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

## MUNICIPAL CONTRACTS AND REFERENCE CONTACTS

Anderson County, TN  
Anderson County Solid Waste  
8 Convenience Centers Operations,  
Roll-Off and Front Loader Collection  
Service for entire school system  
and 21 Commercial Customers

Mr. Geoff Trabalka  
Solid Waste Manager  
Anderson County  
100 North Main St., Ste 127  
Clinton, TN 37716  
(865) 463-6870

Alcoa, TN  
City of Alcoa  
Residential Curbside  
Recycling Collection  
3,100 Homes

Mr. Shane Snoderly  
Director of Public Works  
City of Alcoa  
725 Universal Street  
Alcoa, TN 37701  
(865) 380-4806

Baneberry, TN  
City of Baneberry  
Curbside Residential  
Solid Waste Collection  
206 Homes

Mr. Thomas Nuzzi  
City Manager  
667 Harrison Ferry Rd.  
Baneberry, TN 37890  
(865) 674-0214  
tnuzzi@cityofbaneberry.com

Blount County, TN  
Blount County Recycling Center  
And Public Buildings  
Recycling Collection

Mr. Jim Cox  
Operations Manager  
1227 McArthur Rd.  
Maryville, TN 37804  
(865) 982-4652  
[jcox@blounttn.org](mailto:jcox@blounttn.org)

Blount County School  
Frontloader & Roll-Off Services

Mr. James Duke  
Operations Manager  
Office - (865) 982-9412  
Cell - (865) 254-0007  
[James.duke@blountk12.org](mailto:James.duke@blountk12.org)

Cleveland, TN  
City of Cleveland  
Residential Solid Waste  
Collection and Disposal  
14,486 Homes  
945 Commercial Customers

Mr. Joe Fivas  
City Manager  
City of Cleveland  
190 Church St. N.E.  
Cleveland, TN 37364  
(423) 472-4551

Claiborne County  
Disposal Contract from  
County's Transfer Station  
Hauling & Disposal of MSW

Mr. Mike Russell  
Solid Waste Director  
Claiborne County Sanitation Dept.  
PO Box 486  
New Tazewell, TN 37879  
423-626-2080

Clinton, TN  
City of Clinton  
Residential Solid  
Waste Collection  
3,560 Homes

Mr. Roger Houck  
City Manager  
City of Clinton  
100 Bowling Street  
Clinton, TN 37716  
(865) 457-0424  
rhouck@clintontn.net

Crossville, TN  
City of Crossville  
Curbside Residential & Frontload  
Collection and Disposal  
3,807 Homes  
235 Commercial Customers

Mr. Greg Wood  
City Manager  
99 Municipal Ave.  
Crossville, TN 38555  
(931) 484-5113

Cumberland County, TN  
Transfer Station & Landfilling  
Services for entire County and  
it's Cities

Mr. Allen Foster  
County Mayor  
2 North Main St. Suite 203  
Crossville, TN 38555  
(931) 484-6165

Harriman, TN  
City of Harriman  
Residential Solid Waste  
Collection and Disposal  
2,785 Homes

Mr. Scott Mason  
City Manager  
City of Harriman  
PO Box 433 (609 N. Roane St)  
Harriman, TN 37748  
(865) 882-9414

Jefferson City, TN  
Jefferson City  
Residential Solid Waste Collection  
And Recycle  
2,454 Homes  
10 Commercial Customers

Mr. James Gallup  
City Manager  
Jefferson City  
PO Box 530  
Jefferson City, TN 37760  
(865) 343-9993  
jgallup@jeffcitytn.com

Knoxville Community Development Corp.  
Collection of all Solid Waste  
20 Locations with Frontload Collection

Mr. Terry McKee  
Procurement Director  
901 Broadway  
Knoxville, TN 37917  
(865) 403-1133  
tmckee@kcdc.org

Kingston, TN  
City of Kingston  
Residential Solid Waste  
Collection and Disposal  
2,256 Homes

Mr. David Bolling  
City Manager  
City of Kingston  
900 Waterford Place  
Kingston, TN 37763  
(865) 376-6584 Ext 4  
David.bolling@kingstontn.gov

Knox County, TN  
8 Convenient Centers  
Collection and Disposal

Mr. Drew Thurman  
Assistant Solid Waste Director  
205 W. Baxter Ave.  
Knoxville, TN 37917-9493  
(865) 215-5841

Knox County, TN  
Knox County  
Transfer Station & Landfilling Services

Mr. Drew Thurman  
Assistant Solid Waste Director  
205 W. Baxter Ave.  
Knoxville, TN 37917-9493  
(865) 215-5841

Knoxville, TN  
City of Knoxville  
Residential Solid Waste and  
Frontload Commercial Collection  
60,041 Homes  
42 Commercial Customers

Mr. Chad Weth  
Director of Public Works  
City of Knoxville  
PO Box 1631  
Knoxville, TN 37901  
(865) 215-2060  
cweath@knoxvilletn.gov

Knoxville, TN  
City of Knoxville  
Transfer Station & Landfilling Services

Mr. Chad Weth  
Director of Public Works  
City of Knoxville  
PO Box 1631  
Knoxville, TN 37901  
(865) 215-2060

Knoxville, TN  
Residential Drop-Off  
Recycling Convenience Centers  
Collection 8 Centers  
31,582 Curbside Single Stream  
Recycling Residential Collection  
Program

Mr. Chad Weth  
Director of Public Service  
City of Knoxville  
PO Box 1631  
Knoxville, TN 37901  
(865) 215-2060  
cweth@knoxvilletn.gov

City of Lakesite, TN  
Residential Garbage  
Yard Waste, Bulky Items  
Collection and Disposal  
646 Homes  
9 Commercial Customers

Ms. Kirsten Ert  
City Manager  
City of Lakesite  
9201 Rocky Point Road  
Lakesite, TN 37379  
(423) 842-2533

Loudon County, TN  
3 Convenience Centers  
Collection

Ms. Susan Huskey  
Director of Purchasing  
Loudon County Purchasing Dept.  
100 River Road, Ste 110  
Loudon, TN 37774  
(865) 458-4663, ext. 101

Madisonville, TN  
Town of Madisonville  
Residential Solid Waste  
Collection and Disposal  
1,772 Homes

Ms. Sherri McCrary  
City Recorder  
Town of Madisonville  
310 S. Tellico St., Ste 2  
Madisonville, TN 37354  
(423) 442-9416  
sherrimccrary@madisonvilletn.gov

Meigs County, TN  
Meigs County  
Landfill Disposal  
And County Wide Convenience Centers

Mr. William L. James  
Meigs County Executive  
(423) 334-5850

Monroe County, TN  
Monroe County Transfer Station  
Vonore, TN  
Operation of Transfer Station  
For All County  
MSW Waste

Mr. Brandon West  
Solid Waste Director  
310 S. Tellico St., Ste A  
Madisonville, TN 37354  
(423) 442-2497

Monroe County Convenience Centers  
Monroe County, TN  
Supply Roll-off Equipment and  
Collection for 5 Convenience Centers

Mr. Brandon West  
Mayor  
310 S. Tellico St., Ste A  
Madisonville, TN 37354  
(423) 442-2497

Norris, TN  
City of Norris  
Residential Solid Waste  
& Recycling Collection  
577 Homes  
20 Commercial Customers

Mr. Scott Hackler  
City Manager  
City of Norris  
PO Box 1090  
Norris, TN 37828  
(865) 494-7645

Oak Ridge, TN  
City of Oak Ridge  
Residential Solid Waste  
And Recycling Collection  
12,329 Homes  
Convenience Center  
Operations

Mr. Patrick Berger  
Public Works Director  
City of Oak Ridge  
PO Box 1  
Oak Ridge, TN 37831  
(865) 425-1875

Town of Oliver Springs, TN  
Oliver Springs, TN  
Residential Garbage Collection  
1,500 Homes

Mr. Thomas McCormick  
City Manager  
Town of Oliver Springs  
701 Main Street  
Oliver Springs, TN 37840  
(865) 435-7722, ext. 2  
[oscitymanager@comcast.net](mailto:oscitymanager@comcast.net)

Public Building Authority  
Curbside Recycling & Front Loader  
OCC Recycling

Mr. David Griffin  
Contract and Procurement  
Public Building Authority  
400 West Main Street  
Suite M22  
Knoxville, TN 37902

Rockwood, TN  
City of Rockwood  
Curbside Residential  
Collection and Disposal  
1725 Homes

Ms. Becky Rupp  
City Administrator  
110 North Chamberlain Ave.  
Rockwood, TN 37854  
(865) 354-0611 Ext. 821

Spring City, TN  
City of Spring City  
Residential Solid Waste  
Collection and Disposal

Ms. Stephanie Motes  
City Manager  
229 Front Street, PO Box 369  
Spring City, TN 37381

Sweetwater, TN  
City of Sweetwater  
Residential Solid Waste  
Collection and Disposal  
2,224 Homes

Ms. Jessica Morgan  
City Recorder  
City of Sweetwater  
PO Box 267  
Sweetwater, TN 37874  
(423) 337-6979  
[jmorgan@sweetwatertn.net](mailto:jmorgan@sweetwatertn.net)

Tellico Plains, TN  
Town of Tellico Plains  
Residential Solid Waste  
Collection and Disposal  
415 Homes

Ms. Marilyn Parker  
Mayor  
Town of Tellico Plains  
405 Veterans Memorial Dr.  
Tellico Plains, TN 37385  
(423) 253-2333

Town of Vonore, TN  
Residential Solid Waste  
Collection and Disposal  
242 Homes

Mayor Mr. John Hammontree  
Town of Vonore  
PO Box 218  
Vonore, TN 37885  
(423) 884-6211



Date: 3/1/2024

Oak Ridge Schools  
304 New York Ave  
Oak Ridge, TN 37830  
Re: Waste Container Services Bid 2024

To: Mary Ann Riley, Purchasing Specialist

Please find the enclosed bid from Waste Management, Inc. of Tennessee for Waste Container Services beginning July 1, 2024. A copy of our W-9 is also enclosed. All rates are included as well as the required signed and notarized affidavits. Please accept this letter as confirmation that we, as the incumbent service provider, agree to and will be upheld to all the General Specifications listed in this bid on pages 2 and 3. Any additional warranties, specifications, documents, etc., available upon request.

If you have any questions or need any additional information not included in this packet, please reach out to me directly.

Thank you for this opportunity to continue our partnership.

Stephanie Friedrich  
Account Executive  
Waste Management, Inc. of Tennessee  
Direct: (502) 225-1278  
Email: [sfriedri@wm.com](mailto:sfriedri@wm.com)





Business

Department

School Administration Building

304 New York Ave

Oak Ridge, Tennessee 37830

Phone (865) 425-9005

Fax (865) 425-9060

## Request for Proposal

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

The Oak Ridge Schools Board of Education is soliciting proposals **Waste Container Services for the district – RFP 24-007.**

### *General Requirements:*

Proposals, bids, or responses will be accepted by the Oak Ridge Schools Business Department no later than **2:00 PM EST, March 7, 2024.** Every document must be enclosed in an envelope clearly marked as a bid document. Two full copies of the proposal must be submitted each with original signatures on both Bid Forms (included in this packet). Any response, bid, or proposal received after the above deadline shall be considered late, and will not be opened or considered. Bid prices must be valid for no less than sixty (60) days from the date of the bid.

All documents shall be submitted to the following address:

Mary Ann Riley, Purchasing Specialist

Re: Waste Container Services

(RFP 24-007)

Oak Ridge Schools

304 New York Ave

Oak Ridge, TN 37830

**General Specifications:**

- Containers are to be furnished and maintained by the Contractor. Any variations of containers such as but not limited to size must be noted.
- Contractor will change out containers on an annual basis or provide an annual cleaning service for each container.
- Contractor will provide repair service for any damage to doors/lids that do not close properly within 48 hours of being notified.
- All container enclosure gates will be properly closed and secured after each service.
- Any reduction in the number of scheduled trash pickups by the Contractor will be credited against additional trash pickups requested by the District. The daily schedule is defined as five (5) pickups per week (one each weekday) except as modified by the holiday schedule or scheduled breaks.
- Contractor will provide the method or schedule used for calculating the fuel and mileage charges.
- Contractor to submit unit costs for "Additional Services" which shall include the following:
  - One additional weekday pickup of one (1) container at any single location
  - One additional weekend or evening pickup at any single location
  - One additional container added at any single location
- Contractor must provide a written description of any variations or exceptions to the above schedule included in the bid amount. No changes will be made during the term of the contract without written approval from the District.
- Any agreement between the selected Contractor and the District may be cancelled by either party upon submission of written notification thirty (30) days in advance of termination of services. Failure by the Contractor to provide the scheduled services for three (3) consecutive weekdays may result in termination of any obligation to the Contractor on the part of the District.
- Invoices to and payments by the District shall be made monthly
- The contract is for one (1) year and the District reserves the right to extend the contract annually for five (5) years.
- Charges for additional services must be itemized and payments for such services will be added to the regular monthly payment.
- No trash service is required on the following holidays:

Labor Day	Christmas Day	Independence Day
Thanksgiving Thursday	New Years Eve	Good Friday
Thanksgiving Friday	New Years Day	Memorial Day
Christmas Eve	Martin Luther King Day	

- Contractor must provide a written description of any restrictions regarding use of containers as to type, size, weight, etc. of trash or debris placed in the containers. (Attach with you your bid response)
- Contractor will provide and add alternate proposal for providing single stream recycling services in addition to the waste removal services.
- Proposal will include the cost of receptacles, pick-up, and removal on a 1 x per week basis.
- Contractor will provide a designated customer service contact to resolve issues in a timely manner.
- Contractor must make every attempt to maintain a standardized schedule of service.

**Submission Requirements:**

1. A detailed bid form, which includes quantity and unit cost must be included in the bid package. Please include specification sheets on all products/terms.
2. **Two full copies of the proposal must be submitted**, with original Bid Forms included with each copy.
3. A detailed description of all warranties and support for equipment and software must be included.
4. Any renewal costs (if any) shall be included in notes on the Bid Form. Specifically, anticipated annually recurring costs for maintenance, support, and upgrades, if any, must be listed.
5. The amount listed on the Bid Form should reflect the **total implementation costs** of this project as submitted.
6. A copy of your W-9 should be included with bid documents.
7. Any questions should be directed to Mary Ann Riley via email: [orspurchasing@ortn.edu](mailto:orspurchasing@ortn.edu)
8. References are required of those bidders who have NOT done business with Oak Ridge Schools. Please submit references on a separate sheet with business name, address, phone number and contact name if known.

Type text here

**Schedule:**

1. **The contract for bid services will begin July 1, 2024. The school year runs from July 1, 2024 to June 30, 2025.**
2. Sealed bids will be opened at the School Administration Building, 304 New York Avenue, Oak Ridge, TN 37830 at **2:00 PM EST March 7, 2024.**

## Bidding Procedures

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

Mary Ann Riley,  
Purchasing Specialist  
Waste Container Services  
RFP 24-007  
304 New York Ave.  
Oak Ridge, TN 37830

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

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

**Criminal Background Compliance:** Bidders shall be required to complete the attached Criminal Background Compliance Affidavit Form in compliance with the provisions of Tennessee Code Annotated 49-5-413.

**EDGAR Certification:** The EDGAR certifications and provisions are required and applied when Oak Ridge Schools expends federal funds for any contract resulting from this procurement process. Pursuant to 2 C.F.R. § 200.326, all contracts, including small purchases, awarded by the District and the District's subcontractors shall contain the procurement provisions of Appendix II to Part 200, as applicable.

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

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

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

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

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

**Non-Boycott of Israel Affidavit:** Concerning the Non-Boycott of Israel Act (TCA 12-4-1 et seq.), by submission of this bid/quote/proposal, each supplier and each person signing on behalf of any supplier certifies, and in the case of a joint bid/quote/proposal, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each supplier is not boycotting Israel pursuant to TCA 12-4-1 and will not during the term of any award. Note: Applicable only to contracts of \$250,000 or more and to suppliers with 10 or more employees.

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

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

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

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

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

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

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

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

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

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

**Bid Form**

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

Project: **Waste Container Services**  
**RFP 24-007**


Bid Opening: **2:00 PM EST, March 7, 2024**

Company Name: Waste Management, Inc. of Tennessee

Address: 9504 Diggs Gap Road  
Heiskell, TN 37754

Phone Number: (502) 592-8433

Email: sfriedri@wm.com

Signature: 

Title: Account Executive

Date: 2/23/2024

**Main Bid:** *Please fill out the following page and return a copy with your proposal.*

**Bid Amount:** TOTAL COST \$ 70,457.76 Annually USD

**Please attach detailed specifications.**

**PLEASE FILL OUT THIS PAGE AND RETURN A COPY WITH YOUR PROPOSAL.**

**Locations, Container Sizes, and Pickup Dates/Times:**

<b>BUILDING</b>	<b>LOCATION/ADDRESS</b>	<b>WEEKLY SERVICE</b>	<b>MONTHLY COST</b>
School Administration Building	304 New York Ave	1 – 6 yd - Daily	\$389.70
Glenwood Elementary	125 Audubon	1 – 8 yd – T/Th	\$207.84
Glenwood Cafeteria		1 – 6 yd – Daily	\$389.70
Linden Elementary	700 Robertsville Rd	1 – 8 yd – Daily	\$519.60
Linden Recycling		1 – 8 yd – F	\$103.92
Willow Brook Elementary	298 Robertsville Rd	1 – 6 yd – M/W/F	\$233.82
Willow Brook Cafeteria		1 – 6 yd - Daily	\$389.70
Woodland Elementary	168 Manhattan Ave	1 – 6 yd – M/W/F	\$233.82
Woodland Elementary Cafeteria		1 – 6 yd - Daily	\$389.70
Jefferson Middle School	200 Fairbanks Rd	1 – 6 yd – M/W/F	\$233.82
Jefferson Middle Cafeteria		1 – 6 yd - Daily	\$389.70
Robertsville Middle School	245 Robertsville Rd	1 – 8 yd – T/Th	\$207.84
Robertsville Middle Cafeteria		1 – 6 yd - Daily	\$389.70
Robertsville Recycling		1 – 8 yd - F	\$103.92
Oak Ridge High School	127 Providence Rd	1 – 6 yd – T/Th	\$155.88
ORHS Gym		1 – 6 yd - Daily	\$389.70
ORHS Cafeteria		1 – 6 yd - Daily	\$389.70
ORHS – Secret City Academy		1 – 6 yd – T/Th	\$155.88
ORHS – Recycling @ Cafeteria		1 – 8 yd - F	\$103.92
ORHS – Recycling	127 Providence Rd	1 – 8 yd - F	\$103.92
Oak Ridge Preschool	157 Carver Ave	1 – 6 yd - Daily	\$389.70
Blankenship Field	144 Broadway Ave	1 – 8 yd – Will Call	\$24.00 per

TOTAL: \$5,871.48 Monthly \*

\*Please be sure to include all costs of implementation in the total (any surcharges, charges to be incurred, etc.).

**HOLD HARMLESS AGREEMENT**

This Hold Harmless Agreement is between Waste Management, Inc. of Tennessee  
Name of Contractor  
(Hereinafter Contractor), and Oak Ridge Schools named in this bid.

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

Name of Contractor: Waste Management, Inc. of Tennessee

By: Stephanie Friedrich

Title: Account Executive

STATE OF Kentucky  
County of Jefferson

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

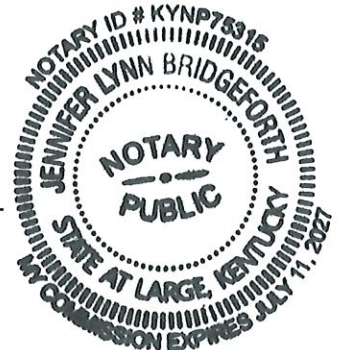
Waste Management, Inc. of Tennessee

[Signature]  
Signature

Witness by hand and Notaries seal at office this 5th day of March,  
year of 2021.

[Signature]  
Notary Public

My Commission Expires: July 11, 2027



**NON-COLLUSION AFFIDAVIT**

NON-COLLUSION AFFIDAVIT TO BE EXECUTED  
BY CONTRACTOR

State of Kentucky

County of Jefferson

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

Subscribed and sworn to (or affirmed) before me this 5th day  
of March, 2024.

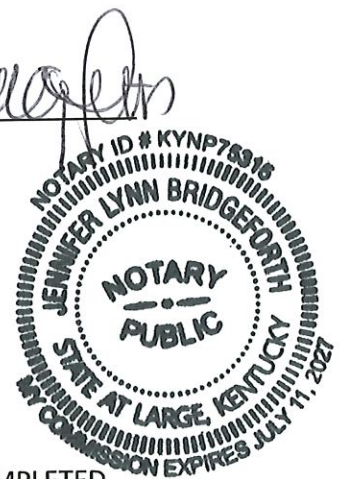
Stephanie Friedrich  
Signature of Officer

Jennifer Lynn Bridgeforth  
Notary Signature

Stephanie Friedrich  
Typed Name of Officer

Waste Management, Inc.  
Office of Tennessee

Notary Seal



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

**IRAN DIVESTMENT ACT REQUIREMENTS**

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

**CERTIFICATION**

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



Signature

2/23/2024

Date

Stephanie Friedrich

Printed Name

Account Executive

Title

Waste Management, Inc. of Tennessee

Name of Firm/Company

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

**CRIMINAL BACKGROUND COMPLIANCE AFFIDAVIT**

STATE OF Kentucky

COUNTY OF Jefferson

The undersigned, principal officer of Waste Management, Inc. of Tennessee, an Employer contracting with the Oak Ridge School Board of Education to provide services having direct contact with children or access to grounds of an Oak Ridge public school while students are on grounds, hereby states under oath as follows:

1. The undersigned is a principal officer of Waste Management, Inc. of Tennessee (hereafter referred to as the "Company") and is duly authorized to execute this Affidavit on behalf of the Company.
2. The Company submits this Affidavit pursuant to T.C.A. § 49-5-413 as amended effective September 1, 2007, for entities entering into contracts with a local board of education where the Company's employees will have direct contact with school children or access to the grounds of a school when children are present. It is the duty of the Company to require applicants supply a fingerprint sample and submit to a criminal history records check to be conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the person to have contact with such children or enter school grounds and to take certain other actions based upon the results of the records check.
3. The Company is in compliance with the terms of T.C.A. § 49-5-413.

Further affiant saith naught.  
Principal Officer

STATE OF Kentucky

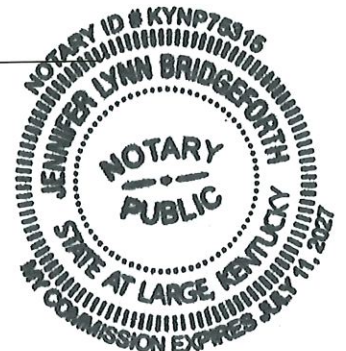
COUNTY OF Jefferson

Before me personally appeared Stephanie Friedrich with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the AE of WM and is authorized to execute this instrument on behalf of the principal for the purposes therein contained.

Witness my hand and seal at office this 5 day of March 2027.

Notary Public

My commission expires: July 11, 2027



**DRUG-FREE WORKPLACE AFFIDAVIT**

STATE OF Kentucky

COUNTY OF Jefferson

The undersigned, principal officer of Waste Management, Inc. of Tennessee, an employer of five (5) or more employees contracting with Oak Ridge School District to provide construction services, hereby states under oath as follows:

1. The undersigned is a principal officer of Waste Management, Inc. of Tennessee (hereafter referred to as the "Company") and is duly authorized to execute this Affidavit on behalf of the Company.
2. The Company submits this Affidavit pursuant to T.C.A. § 50-9-113 which requires each employer with no less than five (5) employees receiving pay who contracts with the state or any local government to provide construction services to submit an affidavit stating that such employer has a drug-free workplace program that complies with Title 50, Chapter 9, of the Tennessee Code Annotated.
3. The Company is in compliance with the terms of T.C.A. § 50-9-113.

Further affiant saith naught.

Principal Officer: [Signature]

STATE OF Kentucky

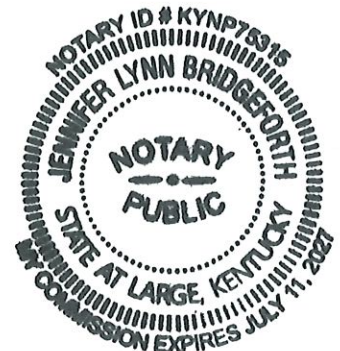
COUNTY OF Jefferson

Before me personally appeared Stephanie Friedrich with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the Account Executive of Waste Management, Inc. of TN and is authorized to execute this instrument on behalf of the principal for the purposes therein contained.

Witness my hand and seal at office this 5 day of March, 2024.

Notary Public: [Signature]

My commission expires JULY 11, 2027







**RFP 24-007  
WASTE CONTAINER SERVICES**

**OAK RIDGE SCHOOLS  
TENNESSEE  
School Administration Building  
304 New York Avenue  
Oak Ridge Tenn 37830  
Mary Ann Riley  
Purchasing Specialist  
orspurchasing@ortn.edu**

**Submitted by:**

**Norma Yanez  
Government Contract Manager  
Waste Industries, LLC dba GFL Environmental  
1901 Sutherland Ave  
Knoxville, Tenn 37921  
Local Office 865-475-7777  
252-241-2056 cell  
norma.yanez@gflenv.com**

**RFP: Solid Waste Services due March 7, 2024 2:00 pm**

**Bid Form**

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

**Project:** **Waste Container Services**  
**RFP 24-007**

**Bid Opening:** **2:00 PM EST, March 7, 2024**

**Company Name:** GFL Environmental

**Address:** 1901 Sutherland Avenue  
Knoxville, Tenn 37921

**Phone Number:** 865-475-7777

**Email:** travis.hitchcock@gflenv.com

**Signature:** 

**Title:** Regional Vice President

**Date:** February 28, 2024

**Main Bid:** *Please fill out the following page and return a copy with your proposal.*

**Bid Amount:** TOTAL COST \$ 7545.52 USD

**Please attach detailed specifications.**

**HOLD HARMLESS AGREEMENT**

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

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

Name of Contractor: GFL Environmental

By: [Signature]

Title: Travis Hitchcock Regional Vice President

STATE OF North Carolina  
County of Wake

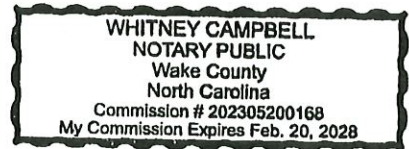
Travis Hitchcock personally appeared before me, the undersigned, with whom I am personally acquainted and who, upon oath, acknowledged that he/she/it executed the within instrument for the purposes therein contained, and who further acknowledge that he/she/it is authorized to execute this interment on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

GFL Environmental

[Signature]  
Signature

Witness by hand and Notaries seal at office this 29 day of Feb  
year of 2024.

Whitney Campbell  
Notary Public



My Commission Expires: Feb. 20, 2028

**IRAN DIVESTMENT ACT REQUIREMENTS**

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

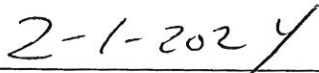
**CERTIFICATION**

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

  
\_\_\_\_\_  
Signature

Travis Hitchcock  
\_\_\_\_\_  
Printed Name

GFL Environmental  
\_\_\_\_\_  
Name of Firm/Company

  
\_\_\_\_\_  
Date

Regional Vice President  
\_\_\_\_\_  
Title

\*[https://tn.gov/assets/entities/generalservices/cpo/attachments/List\\_of\\_persons\\_pursuant\\_to\\_Tenn\\_Code\\_An\\_12-12-106\\_Iran\\_Divestment\\_Act-July.pdf](https://tn.gov/assets/entities/generalservices/cpo/attachments/List_of_persons_pursuant_to_Tenn_Code_An_12-12-106_Iran_Divestment_Act-July.pdf)

**DRUG-FREE WORKPLACE AFFIDAVIT**

STATE OF North Carolina

COUNTY OF Wake

The undersigned, principal officer of GFL Environmental, an employer of five (5) or more employees contracting with Oak Ridge School District to provide construction services, hereby states under oath as follows:

1. The undersigned is a principal officer of GFL Environmental (hereafter referred to as the "Company") and is duly authorized to execute this Affidavit on behalf of the Company.
2. The Company submits this Affidavit pursuant to T.C.A. § 50-9-113 which requires each employer with no less than five (5) employees receiving pay who contracts with the state or any local government to provide construction services to submit an affidavit stating that such employer has a drug-free workplace program that complies with Title 50, Chapter 9, of the Tennessee Code Annotated.
3. The Company is in compliance with the terms of T.C.A. § 50-9-113.

Further affiant saith naught.

Principal Officer: ~~Travis Hitchcock~~

STATE OF North Carolina

COUNTY OF Wake

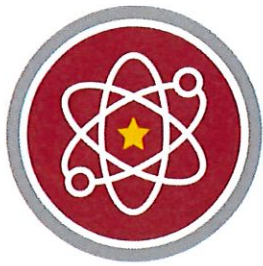
Before me personally appeared Travis Hitchcock with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the Regional VP of GFL Environmental and is authorized to execute this instrument on behalf of the principal for the purposes therein contained.

Witness my hand and seal at office this 29 day of Feb. 2024.

Notary Public: Whitney Campbell

My commission expires Feb. 20, 2028

WHITNEY CAMPBELL  
NOTARY PUBLIC  
Wake County  
North Carolina  
Commission # 202305200168  
My Commission Expires Feb. 20, 2028



# Oak Ridge

SCHOOLS

Maintenance and Operations

## OFFICE OF MAINTENANCE AND OPERATIONS

**DATE:** March 7, 2024

**TO:** Bruce Lay, Executive Director of School Leadership

**FROM:** Allen Thacker, Director of Maintenance and Operations

**SUBJECT:** ORHS Performing Arts Center HVAC Replacement Project

Mr. Lay,

I am recommending that the Oak Ridge Schools Board of Education approve the contract Powell Brothers Mechanical Contractors, LLC of Clinton TN for the replacement of the ORHS Performing Arts Center HVAC system in the amount of \$169,881.00. Work is scheduled to be completed over the summer break and will include the changing out of the four 20-ton water source heat pumps that provide heating and cooling for the main seating area.

Funding for this purchase is from CIP and Regular Capital Outlay – Building Improvements – Contingency 76100 707. Bids were advertised in accordance with state guidelines and made available on the Oak Ridge Schools' website and Vendor Registry with two vendors responding to the bid.

Thank you,

Allen Thacker

Director of Maintenance and Operations

***Maintenance Office***

100 Woodbury, Oak Ridge, TN 37830

(865) 425-3171

[www.ortn.edu](http://www.ortn.edu)



Business

Department

School Administration Building

304 New York Ave

Oak Ridge, Tennessee 37830

Phone (865) 425-9005

Fax (865) 425-9060

## Request for Proposal

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

The Oak Ridge Schools Board of Education is soliciting proposals **for HVAC Replacement in the ORHS Auditorium (RFP 24-009).**

### *General Requirements:*

Proposals, bids, or responses will be accepted by the Oak Ridge Schools Business Department no later than **3:00 PM EST, March 7, 2024**. Every document must be enclosed in an envelope clearly marked as a bid document. Two full copies of the proposal must be submitted each with original signatures on both Bid Forms (included in this packet). Any response, bid, or proposal received after the above deadline shall be considered late, and will not be opened or considered. Bid prices must be valid for no less than sixty (60) days from the date of the bid.

All documents shall be submitted to the following address:

Mary Ann Riley, Purchasing Specialist

Re: HVAC Replacement ORHS Auditorium  
(RFP 24-009)

Oak Ridge Schools

304 New York Ave

Oak Ridge, TN 37830

SPECIFICATIONS:

Per plan attached:



THESE PLANS AND SPECIFICATIONS ARE REQUIRED TO BE KEPT ON THE JOB SITE UNTIL A FINAL CERTIFICATE OF OCCUPANCY OR PROJECT COMPLETION FORM IS ISSUED BY THIS OFFICE.  
No alterations, additions or modifications of any kind are allowed to the approved plans without the permission of this office.  
TENNESSEE STATE FIRE MARSHAL'S OFFICE

Date: 1/24/2024

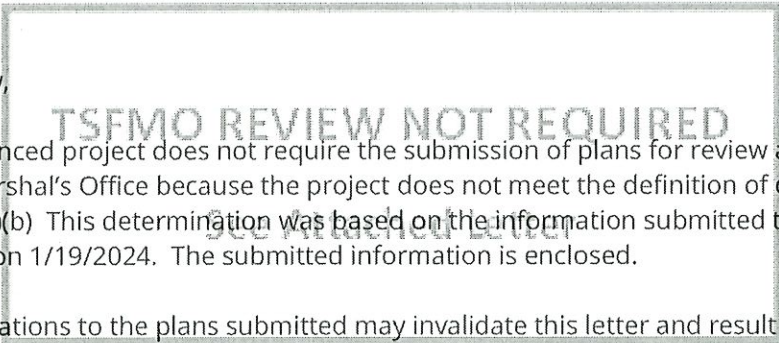
To: Bernie McGraw  
Bedinger Consulting Engineers  
5641 Merchants Center Blvd; STE A104  
Knoxville, TN 37912

RE: Review and Approval Not Required

Auditorium HVAC Replacement at Oak Ridge High School  
1450 Oak Ridge Turnpike  
Oak Ridge, TN 36830

TFM # 00059  
Project # 2024-01-18-01  
County: Anderson

Dear Mr. McGraw,



The above referenced project does not require the submission of plans for review and approval by the State Fire Marshal's Office because the project does not meet the definition of construction. Rule 0780-02-03-0.1(1)(b) This determination was based on the information submitted to the plan's submittal portal on 1/19/2024. The submitted information is enclosed.

Subsequent alterations to the plans submitted may invalidate this letter and result in the need for plans to be submitted and approved prior to work being performed. If you have any further questions, please contact me at (615) 253-4790.

Sincerely,

Dennis Rhodes, Plans Examiner II  
Codes Enforcement Section

cc: DSFM - Michael Myers, FileNet

Encl: 2-pages

PROJECT # 2024-01-18-01 TFM # 00059  
FIELD SET

**Submission Requirements:**

1. A detailed bid form, which includes quantity and unit cost must be included in the bid package. Please include specification sheets on all products/terms.
2. Two full copies of the proposal must be submitted, with original Bid Forms included with each copy.
3. A detailed description of all warranties and support for equipment and software must be included.
4. Any license and renewal costs (if any) shall be included in notes on the Bid Form. Specifically, anticipated annually recurring costs for maintenance, support, software updates and upgrades, if any, must be listed.
5. The amount listed on the Bid Form should reflect the total implementation costs of this project as submitted.
6. A copy of your W-9 should be included with bid documents.
7. Any questions should be directed to Mary Ann Riley via email: [orspurchasing@ortn.edu](mailto:orspurchasing@ortn.edu)

**Schedule:**

1. **There will be a mandatory walk-thru on Wednesday, February 21, 2024 at 2:00pm. Please meet at the entrance to Oak Ridge High School, 1450 Oak Ridge Turnpike, Oak Ridge, TN 37830.**
2. Sealed bids will be opened at the School Administration Building, 304 New York Avenue, Oak Ridge, TN 37830 at **3:00 PM EST March 7, 2024.**
3. All work must be completed by July 12, 2024.

## Bidding Procedures

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

Mary Ann Riley,  
Purchasing Specialist  
HVAC Replacement ORHS  
Auditorium (RFP 24-009)  
304 New York Ave.  
Oak Ridge, TN 37830

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

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

**Criminal Background Compliance:** Bidders shall be required to complete the attached Criminal Background Compliance Affidavit Form in compliance with the provisions of Tennessee Code Annotated 49-5-413.

**EDGAR Certification:** The EDGAR certifications and provisions are required and applied when Oak Ridge Schools expends federal funds for any contract resulting from this procurement process. Pursuant to 2 C.F.R. § 200.326, all contracts, including small purchases, awarded by the District and the District's subcontractors shall contain the procurement provisions of Appendix II to Part 200, as applicable.

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

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

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

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

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

**Non-Boycott of Israel Affidavit:** Concerning the Non-Boycott of Israel Act (TCA 12-4-1 et seq.), by submission of this bid/quote/proposal, each supplier and each person signing on behalf of any supplier certifies, and in the case of a joint bid/quote/proposal, each party thereto certifies as to its own organization, under penalty of perjury, that to the best of its knowledge and belief that each supplier is not boycotting Israel pursuant to TCA 12-4-1 and will not during the term of any award. Note: Applicable only to contracts of \$250,000 or more and to suppliers with 10 or more employees.

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

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

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

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

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

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

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

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

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

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

## Bid Form

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

Project: HVAC Replacement ORHS Auditorium  
RFP 24-009

Bid Opening: 3:00 PM EST, March 7, 2024

Company Name: Powell Brothers Mechanical Contractors

Address: 930 N. Charles Seivers Blvd.  
Clinton, TN 37716

Phone Number: 865-457-3530

Email: kenny@powellbroshvac.com

Signature: 

Title: Owner

Date: 3/5/24

**Main Bid:** *This price is to be for the complete specified equipment and installation as outlined within this RFP 24-009. ALL COSTS ARE TO BE INCLUDED IN THE FINAL PRICE.*

**Bid Amount:** HVAC ORHS Auditorium \$ 169,881.<sup>00</sup> USD  
To be completed by 7/12/2024

Please attach detailed specification

**HOLD HARMLESS AGREEMENT**

This Hold Harmless Agreement is between Powell Brothers Mechanical Contractors  
Name of Contractor  
(Hereinafter Contractor), and Oak Ridge Schools named in this bid.

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

Name of Contractor: Powell Brothers Mechanical Contractors

By: Kenny Powell

Title: Owner

STATE OF Tennessee  
County of Anderson

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

Kenny Powell

Signature

Witness by hand and Notaries seal at office this 6th day of MARCH,  
year of 2024.

Dale C. Isabell

Notary Public


My Commission Expires: march 29 2025

**NON-COLLUSION AFFIDAVIT**

NON-COLLUSION AFFIDAVIT TO BE EXECUTED  
BY CONTRACTOR

State of Tennessee


County of Anderson

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

Subscribed and sworn to (or affirmed) before me this 6th day

of March, 2024.

  
Signature of Officer

  
Notary Signature

Kenny Powell  
Typed Name of Officer

March 29, 2025

Office

Notary Seal

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

**IRAN DIVESTMENT ACT REQUIREMENTS**

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

**CERTIFICATION**

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

  
\_\_\_\_\_  
Signature

Kenny Powell  
\_\_\_\_\_  
Printed Name

Powell Brothers Mechanical Contractors  
\_\_\_\_\_  
Name of Firm/Company

3-6-24  
\_\_\_\_\_  
Date

Owner  
\_\_\_\_\_  
Title

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

CRIMINAL BACKGROUND COMPLIANCE AFFIDAVIT

STATE OF Tennessee

COUNTY OF Anderson


The undersigned, principal officer of Powell Brothers Mechanical Contractors, an Employer contracting with the Oak Ridge School Board of Education to provide services having direct contact with children or access to grounds of an Oak Ridge public school while students are on grounds, hereby states under oath as follows:

1. The undersigned is a principal officer of Powell Brothers Mechanical Contractors (hereafter referred to as the "Company") and is duly authorized to execute this Affidavit on behalf of the Company.
2. The Company submits this Affidavit pursuant to T.C.A. § 49-5-413 as amended effective September 1, 2007, for entities entering into contracts with a local board of education where the Company's employees will have direct contact with school children or access to the grounds of a school when children are present. It is the duty of the Company to require applicants supply a fingerprint sample and submit to a criminal history records check to be conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the person to have contact with such children or enter school grounds and to take certain other actions based upon the results of the records check.
3. The Company is in compliance with the terms of T.C.A. § 49-5-413.

Further affiant saith naught.  
Principal Officer

STATE OF Tennessee

COUNTY OF Anderson

Before me personally appeared Kenny Powell  with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the \_\_\_\_\_ of \_\_\_\_\_ and is authorized to execute this instrument on behalf of the principal for the purposes therein contained.

Witness my hand and seal at office this 6th day of March 29, 2024  
2024

Notary Public Dale C. Psabell  
My commission expires: March 29, 2025

**DRUG-FREE WORKPLACE AFFIDAVIT**


STATE OF Tennessee

COUNTY OF Anderson

The undersigned, principal officer of Powell Brothers Mechanical Contractors, an employer of five (5) or more employees contracting with Oak Ridge School District to provide construction services, hereby states under oath as follows:

1. The undersigned is a principal officer of Powell Brothers Mechanical Contractors (hereafter referred to as the "Company") and is duly authorized to execute this Affidavit on behalf of the Company.
2. The Company submits this Affidavit pursuant to T.C.A. § 50-9-113 which requires each employer with no less than five (5) employees receiving pay who contracts with the state or any local government to provide construction services to submit an affidavit stating that such employer has a drug-free workplace program that complies with Title 50, Chapter 9, of the Tennessee Code Annotated.
3. The Company is in compliance with the terms of T.C.A. § 50-9-113.

Further affiant saith naught.

Principal Officer: 

STATE OF Tennessee

COUNTY OF Anderson

Before me personally appeared Kenny Powell with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the March 6 2024 of Powell Brothers Mechanical and is authorized to execute this instrument on behalf of the principal for the purposes therein contained.

Witness my hand and seal at office this 6th day of March, 2024.

Notary Public: 

My commission expires March 29 2025

# License Search and Verification

Visit <https://core.tn.gov> and click "Public Search" for additional search features.

For best results, please limit the number of search fields. Only exact matches will be displayed. You may need to try different variations of search terms. e.g., "Smith and Smith Construction" and "Smith & Smith Construction." If any name has an apostrophe in it, please replace the apostrophe with a percent sign, entering "Smith's Auto Shop" as "Smith% Auto Shop."

After you submit the search form, your results will appear below the form in this window (the form will remain for your reuse)...if you cannot see the results below, please scroll further down the search form.

For self-insured workers' compensation, or other reports, please submit to the [Public Record Request form](#).

[<< Click Here To Go Back To The Search Page](#)

## License Details

<b>License Status</b>	Active - Fully Licensed
<b>License #</b>	34391
<b>License ID</b>	34391
<b>Expiration Date</b>	Nov 30 2024
<b>Original Date</b>	Nov 18 1993
<b>Profession Code</b>	1801
<b>Profession Name</b>	Contractor
<b>First Name</b>	\
<b>Middle Name</b>	\
<b>Last Name</b>	POWELL BROTHERS MECHANICAL CONTRACTORS, LLC
<b>City</b>	CLINTON
<b>State</b>	TN
<b>Zip Code</b>	37716
<b>Rank</b>	Contractor
<b>License Activity Description</b>	Active - Fully Licensed

---

**Classification and Limit**

CLASS	BC-A
CLASS	BC-b(sm)
CLASS	CE
CLASS	CMC
CLASS	CMC-C
MONETARY LIMIT	\$1,500,000

# Request for Taxpayer Identification Number and Certification

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

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

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Powell Brothers Mechanical Contractors</b>		
	2 Business name/disregarded entity name, if different from above		
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):	
	<input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ <u>  C  </u> <small><b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions) ▶	Exempt payee code (if any) _____  Exemption from FATCA reporting code (if any) _____  <small>(Applies to accounts maintained outside the U.S.)</small>	
	5 Address (number, street, and apt. or suite no.) See instructions. <b>930 N. Charles G. Seivers Blvd.</b>	Requester's name and address (optional) <b>Oak Ridge Schools 304 New York Avenue Oak Ridge, TN 37830</b>	
	6 City, state, and ZIP code <b>Clinton, TN 37716</b>		
	7 List account number(s) here (optional)		

## Part I Taxpayer Identification Number (TIN)

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

Social security number									

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

**or**

Employer identification number									
8	2	-	3	8	8	9	4	1	9

## Part II Certification

Under penalties of perjury, I certify that:

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

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

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
------------------	----------------------------	--------

## General Instructions

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

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

### Purpose of Form

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

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
  - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
  - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
  - Form 1099-S (proceeds from real estate transactions)
  - Form 1099-K (merchant card and third party network transactions)
  - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
  - Form 1099-C (canceled debt)
  - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.
- If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*



# Performance Report

Project Name:  
Oak Ridge High School - Auditorium - HVAC Replacement

Submitted by: Adam Asburry

Tag Name:  
HP-3E-12

## Tag Name: HP-3E-12

Unit Parameters	
Quantity	1
Model	50VQP
Part Number	50VQP240BWC6A1BR
Unit Size	240 (20 tons)
Fluid Type	Water
Fluid Flow Rate	gpm 56.00
Fluid Pressure Drop	ft wg 12.2
Altitude	ft 0
Total Static Pressure	in wg 1.72
Internal Static Pressure	in wg 0.52
Actual Total ESP	in wg 1.20
Duct Static Pressure	in wg 1.20
Fan Speed	AUTO

Electrical	
Voltage	460-3-60
Note:	Neutral wire not required
Compressor Quantity	2
Compressor LRA	Amp 114.0
Compressor RLA	Amp 17
Fan FLA	Amp 6.6
Total FLA	Amp 46.60
Max Overcurrent Protection (MOCP)	Amp 60.00
Min Circuit Amps (MCA)	Amp 50.77
Min/Max Voltage	V 414/506
Fan Motor	HP 5
Fan RPM	927
Fan BHP	BHP 3.8

Cooling	
Airflow	CFM 8000.00
Loop Temp Cooling	°F 77.0
Cooling Ent. Air DB Temp	°F 81.0
Cooling Ent. Air WB Temp	°F 66.0
Total Cooling	MBH 262.1
Sensible Cooling	MBH 202.35
Application Cooling EER	BTUH/W 15.72
Cooling KW	kW 16.67
Heat of Rejection	MBH 319.00
Cooling LAT DB	°F 57.6
Cooling LAT WB	°F 55.1
Cooling LWT	°F 88.4
AHRI/ISO 13256-1 WLHP Cooling	MBH 248.00
AHRI/ISO 13256-1 WLHP EER	BTUH/W 14.40
AHRI/ISO 13256-1 GWHP Cooling	MBH 310.00
AHRI/ISO 13256-1 GWHP EER	BTUH/W 21.10
AHRI/ISO 13256-1 GLHP Cooling	MBH 275.00
AHRI/ISO 13256-1 GLHP EER	BTUH/W 16.00

Heating	
Airflow	CFM 8000.00
Loop Temp Heating	°F 45.0
Heating Ent. Air DB Temp	°F 68.0
Heating LAT	°F 94.9
Total Heating	MBH 232.43
Application Heating COP	4.1
Heating KW	kW 16.76
Heat of Absorption	MBH 165.51
Heating LWT	°F 39.1
AHRI/ISO 13256-1 WLHP Heating	MBH 315.00
AHRI/ISO 13256-1 WLHP COP	5
AHRI/ISO 13256-1 GWHP Heating	MBH 250.00
AHRI/ISO 13256-1 GWHP COP	4.5
AHRI/ISO 13256-1 GLHP Heating	MBH 180.00
AHRI/ISO 13256-1 GLHP COP	3.9

**Note:**

"WLHP" = Water Loop Heat Pump (Boiler/Tower), "GWHP" = Ground Water Heat Pump (Open Loop)  
 "GLHP" = Ground Loop Heat Pump (Geothermal), "\*\* Application EER and COP are at selection design conditions",



# Performance Report

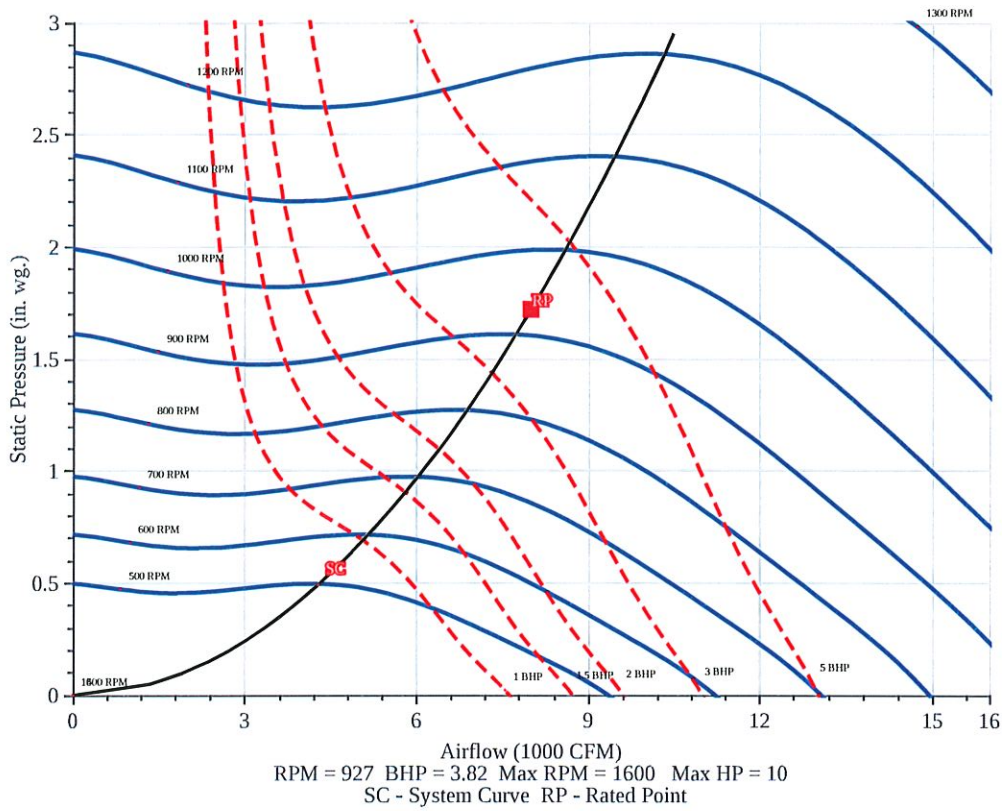
Project Name: Oak Ridge High School - Auditorium - HVAC Replacement

Submitted by: Adam Asburry

Tag Name: HP-3E-12

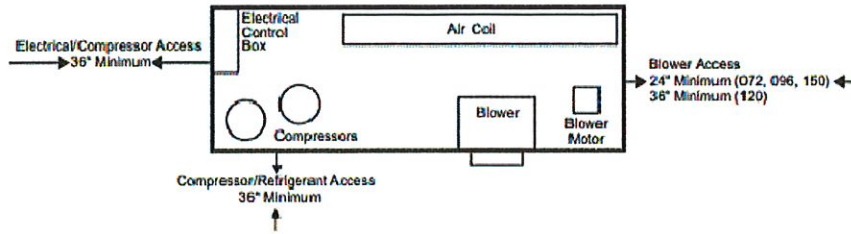
## Fan Curve

50VQP/HQP 210-360

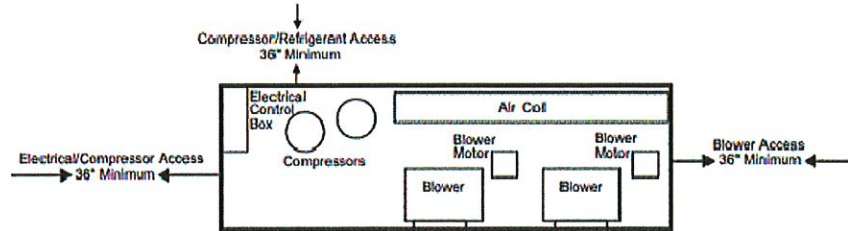




50HQ072-150 UNITS SERVICE CLEARANCES

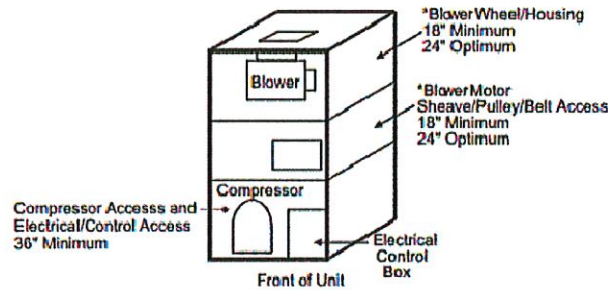


50HQ180-242 UNITS SERVICE CLEARANCES



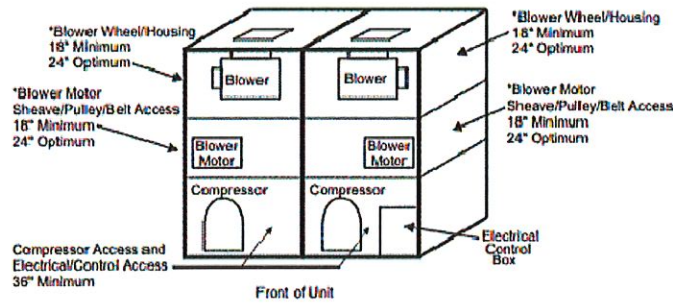
NOTE: The local electric codes may require 36\"/>

50VQ072-181 UNITS SERVICE CLEARANCES

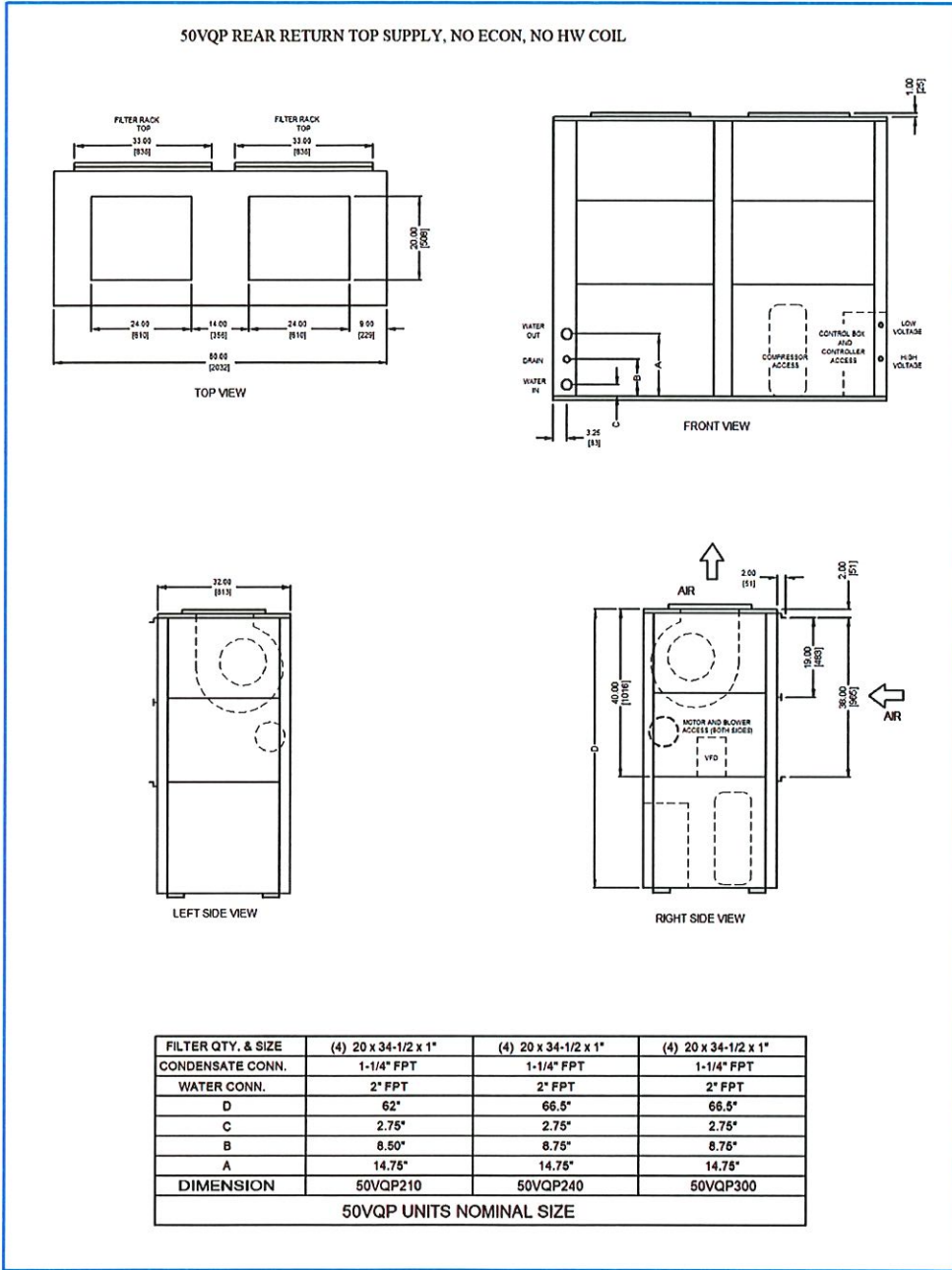


\* Blower motor and blower housing access is required on BOTH SIDES of the unit.

50VQ210-360 UNITS SERVICE CLEARANCES



\* Blower motor and blower housing access is required on BOTH SIDES of the unit.



## **Warranty information**

**Factory authorized startup.**

**Carrier equipment to have one-year parts and labor warranty.**

**Five years compressor parts only warranty.**

# Proposal

**Prepared For:**  
All Bidders

**Date:**  
March 7, 2024

**Project Name:**  
Oak Ridge High School – Auditorium WSHP Replacement

**Consulting Engineer:**  
Bedinger Consulting Engineers

**Delivery Terms:**  
Freight included and prepaid  
FOB Factory

**Payment Terms:**  
Net 30 Days

Based on Plans Dated: 1/15/2024

Addenda Recognized: None

E Solutions for Buildings, LLC is pleased to provide this proposal for your review and approval

## Approved as Equal

### Carrier Water Source Heat Pump

Item	QTY	Description	Tag(s)	Model Number
A1	4	50VQP Large Capacity Water Source Heat Pumps	HP-3E-11 , HP-3E-12, HP-3E-20, and HP-3E-21	50VQP240

#### Product Details and Accessories:

- 460/3/60 power
- PSC fan motor
- Top discharge rear return configuration
- Control power transformer
- Dual Scroll Compressors
- R-410a Refrigerant
- Take apart construction
- Extended Range Operation
- DDC control option for BACnet connectivity

#### Product Warranties:

- Factory authorized startup
- One (1) year entire unit parts and labor warranty
- Five (5) year compressor parts only warranty

#### The following items are NOT included with the equipment identified above:

- Quick ship options
- Disconnects or convenience outlets
- Equipment stands
- Vibration isolation
- Start-up
- DDC control boards and sensors
- Coated coils
- Refrigerant
- Installation, rigging, or carting
- Any piping or accessories except as noted elsewhere in this proposal

**Bid Form**

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

Project: HVAC Replacement ORHS Auditorium  
RFP 24-009

Bid Opening: 3:00 PM EST, March 7, 2024

Company Name: Del-Air Mechanical Contractors Inc.

Address: 135 Chickamauga Ave  
Knoxville, TN. 37913

Phone Number: 865-525-4119

Email: AnthonyC@DelAirMechanical.com

Signature: 

Title: Secretary / Treasurer

Date: March 7, 2024

**Main Bid:** *This price is to be for the complete specified equipment and installation as outlined within this RFP 24-009. ALL COSTS ARE TO BE INCLUDED IN THE FINAL PRICE.*

**Bid Amount:** HVAC ORHS Auditorium \$ 221,731<sup>00</sup> USD  
To be completed by 7/12/2024

Please attach detailed specification

**HOLD HARMLESS AGREEMENT**

This Hold Harmless Agreement is between Del-Air Mechanical Contractors Inc.  
Name of Contractor

(Hereinafter Contractor), and Oak Ridge Schools named in this bid.

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

Name of Contractor: Del-Air Mechanical Contractors Inc.

By: [Signature]

Title: SECRETARY / TREASURER

STATE OF Tennessee  
County of Knox

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

Del-Air Mechanical Contractors Inc.

[Signature]

Signature

Witness by hand and Notaries seal at office this 7th day of MARCH,  
year of 2024.

Dana Rhannon Squalla  
Notary Public

My Commission Expires: May 1, 2027



**NON-COLLUSION AFFIDAVIT**

NON-COLLUSION AFFIDAVIT TO BE EXECUTED  
BY CONTRACTOR

State of   TN  

County of   KNOX  

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

Subscribed and sworn to (or affirmed) before me this   7th   day

of   March  , 2024.

  
\_\_\_\_\_

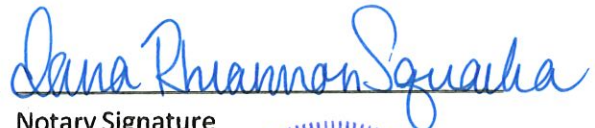
Signature of Officer

  Gary Shipley  

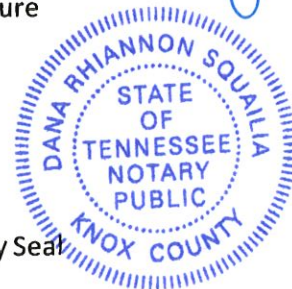
Typed Name of Officer

\_\_\_\_\_  
Secretary of Treasure

Office



Notary Signature



Notary Seal

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

**IRAN DIVESTMENT ACT REQUIREMENTS**

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


**CERTIFICATION**


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

  
\_\_\_\_\_  
Signature

  
\_\_\_\_\_  
Printed Name

  
\_\_\_\_\_  
Name of Firm/Company

  
\_\_\_\_\_  
Date

  
\_\_\_\_\_  
Title

\*[https://tn.gov/assets/entities/generalservices/cpo/attachments/List\\_of\\_persons\\_pursuant\\_to\\_Tenn.\\_Code\\_An\\_n\\_12-12-106.\\_Iran\\_Divestment\\_Act-July.pdf](https://tn.gov/assets/entities/generalservices/cpo/attachments/List_of_persons_pursuant_to_Tenn._Code_An_n_12-12-106._Iran_Divestment_Act-July.pdf)

**DRUG-FREE WORKPLACE AFFIDAVIT**

STATE OF Tennessee

COUNTY OF Knox

The undersigned, principal officer of Del-Air Mechanical Contractors Inc. an employer of five (5) or more employees contracting with Oak Ridge School District to provide construction services, hereby states under oath as follows:

1. The undersigned is a principal officer of Del-Air Mechanical Contractors Inc. (hereafter referred to as the "Company") and is duly authorized to execute this Affidavit on behalf of the Company.
2. The Company submits this Affidavit pursuant to T.C.A. § 50-9-113 which requires each employer with no less than five (5) employees receiving pay who contracts with the state or any local government to provide construction services to submit an affidavit stating that such employer has a drug-free workplace program that complies with Title 50, Chapter 9, of the Tennessee Code Annotated.
3. The Company is in compliance with the terms of T.C.A. § 50-9-113.

Further affiant saith naught.

Principal Officer: [Signature]

STATE OF Tennessee

COUNTY OF Knox

Before me personally appeared Gary Shipley with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the Secretary of Treasure of Del-Air Mechanical and is authorized to execute this instrument on behalf of the principal for the purposes therein contained.

Witness my hand and seal at office this 7th day of March 2024.

Notary Public: Dana Rhiannon Squalla

My commission expires May 1, 2027



**CRIMINAL BACKGROUND COMPLIANCE AFFIDAVIT**

STATE OF Tennessee

COUNTY OF Knox

The undersigned, principal officer of Del-Air Mechanical Contractors Inc., an Employer contracting with the Oak Ridge School Board of Education to provide services having direct contact with children or access to grounds of an Oak Ridge public school while students are on grounds, hereby states under oath as follows:

1. The undersigned is a principal officer of Del-Air Mechanical Contractors Inc. (hereafter referred to as the "Company") and is duly authorized to execute this Affidavit on behalf of the Company.
2. The Company submits this Affidavit pursuant to T.C.A. § 49-5-413 as amended effective September 1, 2007, for entities entering into contracts with a local board of education where the Company's employees will have direct contact with school children or access to the grounds of a school when children are present. It is the duty of the Company to require applicants supply a fingerprint sample and submit to a criminal history records check to be conducted by the Tennessee Bureau of Investigation and the Federal Bureau of Investigation prior to permitting the person to have contact with such children or enter school grounds and to take certain other actions based upon the results of the records check.
3. The Company is in compliance with the terms of T.C.A. § 49-5-413.

Further affiant saith naught.  
Principal Officer

STATE OF Tennessee

COUNTY OF Knox

Before me personally appeared Gary Shipley with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the Security Person of Del-Air Mechanical Contractors Inc. and is authorized to execute this instrument on behalf of the principal for the purposes therein contained.

Witness my hand and seal at office this 7th day of March, 2024.  
Notary Public Dana Phammon Squacha  
My commission expires: May 1, 2027

# Request for Taxpayer Identification Number and Certification

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

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

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Del-Air Mechanical Contractors, INC</b>	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input checked="" type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate  <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.  <input type="checkbox"/> Other (see instructions) ▶ _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  Exempt payee code (if any) _____  Exemption from FATCA reporting code (if any) _____  <i>(Applies to accounts maintained outside the U.S.)</i>
5 Address (number, street, and apt. or suite no.) See instructions. <b>135 Chickamauga Ave</b>	Requester's name and address (optional) <b>Oak Ridge Schools</b>
6 City, state, and ZIP code <b>Knoxville TN 37917</b>	<b>304 New York Ave</b> <b>Oak Ridge TN 37830</b>
7 List account number(s) here (optional)	

Print or type. See Specific Instructions on page 3.

## Part I Taxpayer Identification Number (TIN)

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

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

<b>Social security number</b>										
or										
<b>Employer identification number</b>										
6	2		-	1	8	6	2	4	7	8

## Part II Certification

Under penalties of perjury, I certify that:

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

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

<b>Sign Here</b>	Signature of U.S. person ▶ <i>Jana Squaha</i>	Date ▶ <i>MARCH 7, 2024</i>
------------------	---	-----------------------------

## General Instructions

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

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

### Purpose of Form

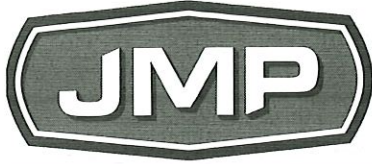
An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number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

- Form 1099-INT (interest earned or paid)

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

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

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



# JMP Equipment Company, LLC

Heating, Cooling, and Plumbing Representatives  
since 1958

www.jmpco.com

Quotation No. MQ-68253

JMP Equipment Company, LLC	Bid Date	3/7/2024
	Date:	3/5/2024
Phone: 800-365-9010	Job:	Oak Ridge High School - Auditorium
		Oak Ridge, TN
Email: Rons@jmpco.com	Engineer:	Albert F G Bedinger Consulting Engineers

We are pleased to quote you on the following equipment for the above job subject to approval. Quantities listed are not guaranteed and should be verified. Prices will be adjusted accordingly. This quotation is subject to change without notice and void after 30 days unless otherwise stated below. All Contracts or Orders are subject to acceptance by the Company and are contingent upon non-occurrence of strikes or other delays beyond their control. In addition to prices named herein, you are to pay any applicable sales taxes.

QTY	Description & Group	Total WT (lbs)	Price Each	Total Net Price
<b>100 - Water Source Heat Pumps</b>				
4	CLIMATE MASTER NS - Climate Master - TLV240AFP4CCFTS - 20 Ton, 460/3, Top Discharge, PSC Motor, Front Return, Standard Range 1" Ultra Quite, Uncoated Air Coil, Copper Water Coil, 1" Filter. DXM2.5 w/MPC Controls.		\$17,663.00	\$70,652.00
	<b>Subtotal For Above:</b>			<b>\$70,652.00</b>
<b>800 - Control Valve (If Needed)</b>				
4	CLIMATE MASTER NS - S23S0254N01 - 2.0" Motorized Solenoid Valve - on/off		\$611.00	\$2,444.00
	<b>Subtotal For Above:</b>			<b>\$2,444.00</b>
<b>900 - Coil Kits (If Needed)</b>				
4	AF2Y-2 - Bell and Gossett 2" Valve Kit sized for 4 to 45.5 GPM Inlet: 2" NPTM Outlet: 2" NPTF	102	\$903.00	\$3,612.00
8	H36-200MM - H3 2.0" x 36" SS Braided Hose Brass		\$263.00	\$2,104.00
	<b>Subtotal For Above:</b>			<b>\$5,716.00</b>
<b>TOTAL PRICE FOR ABOVE EQUIPMENT:</b>				<b>\$78,812.00</b>

Thanks,  
Ron Summers

## Commercial Limited Express Warranty



## CLIMATE MASTER, INC.

### LIMITED EXPRESS WARRANTY/ LIMITATION OF REMEDIES AND LIABILITY

It is expressly understood that unless a statement is specifically identified as a warranty, statements made by Climate Master, Inc., a Delaware corporation, ("CM") or its representatives, relating to CM's products, whether oral, written or contained in any sales literature, catalog or any other agreement, are not express warranties and do not form a part of the basis of the bargain, but are merely CM's opinion or commendation of CM's products.

**EXCEPT AS SPECIFICALLY SET FORTH HEREIN, THERE IS NO EXPRESS WARRANTY AS TO ANY OF CM'S PRODUCTS. CM MAKES NO WARRANTY AGAINST LATENT DEFECTS. CM MAKES NO WARRANTY OF MERCHANTABILITY OF THE GOODS OR OF THE FITNESS OF THE GOODS FOR ANY PARTICULAR PURPOSE.**

#### GRANT OF LIMITED EXPRESS WARRANTY

CM warrants CM products purchased and retained in the United States of America and Canada to be free from defects in material and workmanship under normal use and maintenance as follows: (1) All complete air conditioning, heating and/or heat pump units built or sold by CM for twelve (12) months from date of unit start up or eighteen (18) months from date of shipment (from factory), whichever comes first; (2) Repair and replacement parts, which are not supplied under warranty, for ninety (90) days from date of shipment (from factory). All parts must be returned to CM's factory in Oklahoma City, Oklahoma, freight prepaid, no later than sixty (60) days after the date of the failure of the part; if CM determines the part to be defective and within CM's Limited Express Warranty, CM shall, when such part has been either replaced or repaired, return such to a factory recognized dealer, contractor or service organization, F.O.B. CM's factory, Oklahoma City, Oklahoma, freight prepaid. The warranty on any parts repaired or replaced under warranty expires at the end of the original warranty period.

This warranty does not cover and does not apply to: (1) Air filters, fuses, refrigerant, fluids, oil; (2) Products relocated after initial installation; (3) Any portion or component of any system that is not supplied by CM, regardless of the cause of the failure of such portion or component; (4) Products on which the unit identification tags or labels have been removed or defaced; (5) Products on which payment to CM is or has been in default; (6) Products which have defects or damage which result from improper installation, wiring, electrical imbalance characteristics or maintenance; or are caused by accident, misuse or abuse, fire, flood, alteration or misapplication of the product; (7) Products which have defects or damage which result from a contaminated or corrosive air or liquid supply, operation at abnormal temperatures, or unauthorized opening of refrigerant circuit; (8) Mold, fungus or bacteria damages; (9) Products subjected to corrosion or abrasion; (10) Products manufactured or supplied by others; (11) Products which have been subjected to misuse, negligence or accidents; (12) Products which have been operated in a manner contrary to CM's printed instructions; or (13) Products which have defects, damage or insufficient performance as a result of insufficient or incorrect system design or the improper application of CM's products.

CM is not responsible for: (1) The costs of any fluids, refrigerant or other system components, or associated labor to repair or replace the same, which is incurred as a result of a defective part covered by CM's Limited Express Warranty; (2) The costs of labor, refrigerant, materials or service incurred in removal of the defective part, or in obtaining and replacing the new or repaired part; or, (3) Transportation costs of the defective part from the installation site to CM or of the return of any part not covered by CM's Limited Express Warranty.

**Limitation:** This Limited Express Warranty is given in lieu of all other warranties. If, notwithstanding the disclaimers contained herein, it is determined that other warranties exist, any such warranties, including without limitation any express warranties or any implied warranties of fitness for particular purpose and merchantability, shall be limited to the duration of the Limited Express Warranty.

#### LIMITATION OF REMEDIES

In the event of a breach of the Limited Express Warranty, CM will only be obligated at CM's option to repair the failed part or unit or to furnish a new or rebuilt part or unit in exchange for the part or unit which has failed. If, after written notice to CM's factory in Oklahoma City, Oklahoma, of each defect, malfunction or other failure and a reasonable number of attempts by CM to correct the defect, malfunction or other failure and the remedy fails of its essential purpose, CM shall refund the purchase price paid to CM in exchange for the return of the sold goods. Said refund shall be the maximum liability of CM. **THIS REMEDY IS THE SOLE AND EXCLUSIVE REMEDY OF THE BUYER OR THEIR PURCHASER AGAINST CM FOR BREACH OF CONTRACT, FOR THE BREACH OF ANY WARRANTY OR FOR CM'S NEGLIGENCE OR IN STRICT LIABILITY.**

#### LIMITATION OF LIABILITY

CM shall have no liability for any damages if CM's performance is delayed for any reason or is prevented to any extent by any event such as, but not limited to: any war, civil unrest, government restrictions or restraints, strikes or work stoppages, fire, flood, accident, shortages of transportation, fuel, material, or labor, acts of God or any other reason beyond the sole control of CM. **CM EXPRESSLY DISCLAIMS AND EXCLUDES ANY LIABILITY FOR CONSEQUENTIAL OR INCIDENTAL DAMAGE IN CONTRACT, FOR BREACH OF ANY EXPRESS OR IMPLIED WARRANTY, OR IN TORT, WHETHER FOR CM'S NEGLIGENCE OR AS STRICT LIABILITY.**

#### OBTAINING WARRANTY PERFORMANCE

Normally, the contractor or service organization who installed the products will provide warranty performance for the owner. Should the installer be unavailable, contact any CM recognized dealer, contractor or service organization. If assistance is required in obtaining warranty performance, write or call:

Climate Master, Inc. • Customer Service • 7300 S.W. 44th Street • Oklahoma City, Oklahoma 73179 (405) 745-6000

**NOTE:** Some states or Canadian provinces do not allow limitations on how long an implied warranty lasts, or the limitation or exclusions of consequential or incidental damages, so the foregoing exclusions and limitations may not apply to you. This warranty gives you specific legal rights, and you may also have other rights which vary from state to state and from Canadian province to Canadian province.

Please refer to the CM Installation, Operation and Maintenance Manual for operating and maintenance instructions.



Rev: 11/09

LC083



# Oak Ridge

SCHOOLS

Maintenance and Operations

## OFFICE OF MAINTENANCE AND OPERATIONS

**DATE:** March 7, 2024

**TO:** Bruce Lay, Executive Director of School Leadership

**FROM:** Allen Thacker, Director of Maintenance and Operations

**SUBJECT:** Purchase and Installation Woodland Serving Lines

Mr. Lay,

I am recommending that the Oak Ridge Schools Board of Education approve the purchase and installation of replacement serving lines for Woodland Elementary School from KaTom Restaurant Supply of Kodak TN in the amount of \$32,018.45. The current equipment has exceeded its expected life and parts are becoming difficult to obtain to maintain the equipment in proper working condition.

Funding for this purchase is from the Food Service Capital Equipment Fund. Three competitive quotes were obtained with KaTom Restaurant Supply providing the lowest submitted proposal.

Thank you,

Allen Thacker

Director of Maintenance and Operations

**Maintenance Office**

100 Woodbury, Oak Ridge, TN 37830

(865) 425-3171

[www.ortn.edu](http://www.ortn.edu)

# Oak Ridge Schools Competitive Quote Sheet

Work Order #

		Vendor Name	TriMark	KaTom Restaurant Supply		Culinx		
		Address	3011 Industrial Pkwy E Knoxville, TN 37921	305 Katom Dr. Kodak, TN 37764		1802 1st Ave S Knoxville, TN 37923		
		Quote Number		5/25/3010		8/30/2045		
		Contact Name	Heidi Keller	Nicolas King		Casey McClure		
		Phone Number	865-545-5222	865-225-1545		865-350-5012		
Item	Qty	Description	Unit Price	Ext Price	Unit Price	Ext Price	Unit Price	Ext Price
Vollrath Model No. 36150	1	Hot food serving counter/table	\$14,775.75	\$14,775.75	\$13,844.26	\$13,844.26	\$13,798.55	\$13,798.55
Vollrath Model No. 36176	1	Serving counter, cold food	\$17,281.55	\$17,281.55	\$15,268.78	\$15,268.78	\$16,254.54	\$16,254.54
Vollrath Model No. 37015	1	Cash register stand	\$4,592.15	\$4,592.15	\$3,857.95	\$3,857.95	\$4,034.64	\$4,034.64
		Shipping/Freight				\$2,985.07		\$500.00
		Installation				\$1,243.33		\$600.00
<b>Total:</b>				<b>\$36,649.45</b>		<b>\$37,199.39</b>		<b>\$35,187.73</b>
Duke Model No. E305-25SS	1	Hot food serving counter/table	\$12,318.59	\$12,318.59	\$10,313.69	\$10,313.69	\$12,380.97	\$12,380.97
Duke Model No. 327-25SS-N7	1	Serving counter, cold food	\$16,022.61	\$16,022.61	\$14,364.50	\$14,364.50	\$16,344.25	\$16,344.25
Duke Model No. 306-25SS	1	Cash register stand	\$4,663.52	\$4,663.52	\$4,051.18	\$4,051.18	\$4,436.22	\$4,436.22
		Shipping/Freight				\$2,033.19		\$875.00
		Installation				\$1,255.89		\$600.00
<b>Total:</b>				<b>\$33,004.72</b>		<b>\$32,018.45</b>		<b>\$34,636.44</b>
Discount								
Approved by:								
Terms:								
Delivery Date:								
FOB Point:								



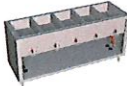
# Sourcewell Contract #063022-SES

02/20/2024

<p><b>Project:</b>  <b>Oakridge -Woodland Elementary</b>  <b>SOURCEWELL</b>  <b>Oak Ridge, TN 37830</b></p>	<p><b>From:</b>  <b>Strategic Equipment, LLC</b>  <b>Heidi Keller</b>  <b>3011 Industrial Parkway East</b>  <b>Knoxville, TN 37921</b>  <b>(865)545-5222 (contact)</b>  <b>(865)522-4448 (Fax)</b></p>
---	--

Thank you for allowing TriMark the opportunity to provide pricing. Please be aware in this very unstable market; manufacturers are experiencing delays, pricing increases and additional freight surcharges and storage fees. As such, quotes will remain in effect for 30 days. TriMark reserves the right to make any corrections or adjustments due to cost increases, market fluctuations, supply chain disruptions, tariffs, third party supplier changes in cost, general contractor delays, or any other factors outside of TriMark's control at any time prior to delivery. We apologize for the inconvenience.

For all custom fabricated equipment, exhaust hoods, walk-in coolers/freezers, and all items requiring owner selections of colors or laminate finishes, these prices are current estimates. We will re-quote those items based on the manufacturers' prices in effect at the time when field measurements can be taken and/or color/laminate selections are made by the owner. This policy also applies to all items of standard manufacture that cannot be shipped immediately upon fabrication to an owner's or general contractor's facility.

Item	Qty	Description
1	1 ea	<b>HOT FOOD SERVING COUNTER / TABLE</b> Model No. E305-25SS  AeroServ™ Hot Food Unit, electric, 74"W x 24.5"D, stainless steel top, (5) stainless steel heat wells, drains, copper manifolds, (1) valve, infinite controls, stainless steel body and undershelf, cULus, UL EPH Classified (NOTE: Electric values & plug configurations change for 3 phase or when adding electric options - Contact Factory for more info)
	1 ea	E30525-208-1 208v/60/1-ph, 4500 watts, 21.6 amps
	1 st	ACA-SET4 Casters, set of 4, 5" dia. swivel type, all with brakes, polyurethane tire, in lieu of standard legs, this may require cord & plug option (cord & plug must be added to hot food units to meet U.L.)
	1 ea	CORD 6 ft. cord & plug
	1 ea	MOD-14-2 14ga stainless steel top, in lieu of standard
	1 ea	SOLID-HD-5CU Tray Slide, customer's side, 74" W x 12-1/4" D, solid stainless steel, on hinged brackets, with (2) 1/8" die-formed rubbing tracks, * 30" high *
	1 ea	MOD-HT Special Height Body, per unit
	1 ea	MOD-HT-32 32" Height Body
	1 ea	TS560-74 Thurmaduke™ Designer Sneeze Guard, 73-3/4"W x 13"D x 18"H, service style, flip-up front glass, painted end panels & shelf & 1/4" acrylic end guards, cULus, UL EPH Classified
	1 ea	SSS Stainless Steel Shelf, in lieu of standard painted steel
	1 ea	SSE Stainless Steel Ends, in lieu of standard painted steel
	1 ea	HL-5 Radiant Heater & Incandescent Light, under shelf & wired to base, 120v/60/1-ph (this may require cord & plug option)
	1 ea	FREIGHT
	1 ea	DUSIP Deliver, uncrate, set in place and make ready for FINAL CONNECTIONS BY OTHERS
		<b>ITEM TOTAL: \$12,318.59</b>

Item	Qty	Description	
2	1 ea	<b>SERVING COUNTER, COLD FOOD</b> Model No. 327-25SS-N7 AeroServ™ Cold Pan Unit, 74"W x 24-1/2"D, stainless steel top, (5) pan size, self-contained refrigeration, 8" deep, 70-1/2"W x 21-3/4"D stainless liner, 1" brass drain & plug, stainless steel body & undershelf, cord & plug, 120v/60/1-ph, 1/3 HP, 6.78 amps, R448a, NEMA 5-15P, CULus, UL EPH Classified	
	1 st	ACA-SET4 Casters, set of 4, 5" dia. swivel type, all with brakes, polyurethane tire, in lieu of standard legs, this may require cord & plug option (cord & plug must be added to hot food units to meet U.L.)	
	1 ea	MOD-14-5 14ga stainless steel top, in lieu of standard	
	1 ea	SOLID-HD-5CU Tray Slide, customer's side, 74" W x 12-1/4" D, solid stainless steel, on hinged brackets, with (2) 1/8" die-formed rubbing tracks, * 30" high *	
	1 ea	MOD-HT Special Height Body, per unit	
	1 ea	MOD-HT-32 32" Height Body	
	1 ea	TS540-74 Thurmaduke™ Designer Sneeze Guard, 73-3/4"W x 13"D x 18"H, self-service style, painted end panels, 13" wide shelf & 1/4" acrylic end guards, cULus, UL EPH Classified	
	1 ea	SSS Stainless Steel Shelf, in lieu of standard painted steel	
	1 ea	SSE Stainless Steel Ends, in lieu of standard painted steel	
	1 ea	LED-5 LED light under shelf, wired to base, 120v/60/1-ph (this may require cord & plug option)	
	1 ea	CORD 6 ft. cord & plug	
	1 ea	FREIGHT	
	1 ea	DUSIP Deliver, uncrate, set in place and make ready for FINAL CONNECTIONS BY OTHERS	
			<b>ITEM TOTAL: \$16,022.61</b>

3	1 ea	<b>CASH REGISTER STAND</b> Model No. 306-25SS AeroServ™ Cashier Stand Unit, 24-1/2"W x 24-1/2"D, stainless steel top, stainless steel body & undershelf	
	1 st	ACA-SET4 Casters, set of 4, 5" dia. swivel type, all with brakes, polyurethane tire, in lieu of standard legs, this may require cord & plug option (cord & plug must be added to hot food units to meet U.L.)	
	1 ea	CS-DR-LK Stainless steel drawer, with lock and keys, for cashier stand	
	1 ea	MOD-14-1 14ga stainless steel top, in lieu of standard	
	1 ea	CUT-OP1-G Round cutout with grommet, in counter top, for cord pass	
	1 ea	SOLID-HD-24.5CL Tray Slide, cashier's left, solid stainless steel, on hinged brackets, with (2) 1/8" die-formed rubbing tracks, * 30" high *	
	1 ea	CORD 6 ft. cord & plug	
	1 ea	E-OP2 Electric outlet, mounted in base, with galvanized junction box, duplex or single receptacle & stainless steel cover, wired to existing power source	
	1 ea	MOD-HT Special Height Body, per unit	
	1 ea	MOD-HT-32 32" Height Body	
	1 ea	FREIGHT	
	1 ea	DUSIP Deliver, uncrate, set in place and make ready for FINAL CONNECTIONS BY OTHERS	
			<b>ITEM TOTAL: \$4,663.52</b>

Item Qty

Description

1 1 ea

**HOT FOOD SERVING COUNTER / TABLE**



Model No. 36150

4-Series Signature Server® Hot Food Serving Counter, 74"W x 28"D x 30"H, 18/300 stainless steel top with 1" turndown on all sides, (5) 12" x 20" x 6-3/8" deep wells with 625 watt elements, individual Touch-Temp® programmable controls, enclosed base, 18/400 series stainless steel unibody construction, pull-out ball valve drain, 3125 watts, cord, plug, cULus, NSF, Made in USA (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 1 year warranty against defects in materials & workmanship

1 ea 208v/60/1-ph

1 ea 9876910 Infinite Dial Controls, with power indicator lights, for 4-Series Signature Server® Counter with (5) hot wells, 208/240v (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 36695 All Stainless finish for 4-Series Signature Server® with stainless steel countertops, 74"W models (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 89283 Traditional Breath Guard, single-sided buffet with top shelf, 1/4 thick tempered glass secured in thick fitting channel with 1-1/2" extruded aluminum, for use with Vollrath (5) well 4-Series Signature Server® with stainless steel countertops, units, mount to stainless steel solid surface (note: requires 14 gauge stainless steel solid surface), 1-year warranty, Made in USA, contact Vollrath for dimensions (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 9879205 Upgrade to 14 gauge stainless steel work surface for, (5) well 74"W 4-Series Signature Server® Hot Food Base (required for this breath guard)

1 ea 99 Aluminum finish, standard

1 ea 08 Cayenne® Incandescent Lighting Strip, for (5) well Traditional breath guard, onboard control with toggle, adjustable reflectors, aluminum construction (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 3751450-2-O Operator Side- Plate Rest - with lift-off bracket, ADA 4-Series Signature Server® with Stainless Steel Countertops, 74"W x 7"D (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 375241450-2-C 4-Series Signature Server® V-rib Tray Slide, for customer side, 74"W x 12"D, fold-down/lift-off brackets, 14/300 series stainless steel (Refer to vollrathfoodservice.com for full warranty policy)

1 st SS4CASTERS 4-Series Signature Server® Swivel Casters, 4"H, (2) braked, standard

1 ea DUSIP Deliver, uncrate, set in place and make ready for FINAL CONNECTIONS BY OTHERS

ITEM TOTAL: \$14,775.75

2 1 ea

**SERVING COUNTER, COLD FOOD**



Model No. 36176

4-Series Signature Server® Stainless Steel Countertop with NSF7 Cold Station, self contained refrigeration, 74"W x 28"D x 30"H, Bloomington-style recessed well displays pans 3" below work surface, coils surround sidewalls, accommodates 6" deep pans, polyurethane foam insulation, standard well drains, seamless display pan well opening 63"W x 19-7/8"D x 6-5/8" deep, 1/3 HP, 7.2 amps, NEMA 5-15P, 120v/60/1-ph, cULus, NSF, Made in USA (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 1 year warranty against defects in materials & workmanship

1 st SS4CASTERS 4-Series Signature Server® Swivel Casters, 4"H, (2) braked, standard

1 ea 36695 All Stainless finish for 4-Series Signature Server® with stainless steel countertops, 74"W models (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 89283 Traditional Breath Guard, single-sided buffet with top shelf, 1/4 thick tempered glass secured in thick fitting channel with 1-1/2" extruded aluminum, for use with Vollrath (5) well 4-Series Signature Server® with stainless steel countertops, units, mount to stainless steel solid surface (note: requires 14 gauge stainless steel solid surface), 1-year warranty, Made in USA, contact Vollrath for dimensions (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 9879305 Upgrade to 14 gauge stainless steel work surface for, 74"W 4-Series Signature Server® Cold Pan (required for this breath guard)

1 ea 99 Aluminum finish, standard

1 ea 93 Fluorescent Lighting Strip, for (5) well Contemporary breath guard, power switch in breath guard (bulbs not included) (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 120v/60/1-ph

1 ea 3751450-2-O Operator Side- Plate Rest - with lift-off bracket, ADA 4-Series Signature Server® with Stainless Steel Countertops, 74"W x 7"D (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 3752450-2-C 4-Series Signature Server® V-rib Tray Slide, for customer side, 74"W x 12"D, fold-down/lift-off brackets (Refer to vollrathfoodservice.com for full warranty policy)

1 ea DUSIP Deliver, uncrate, set in place and make ready for FINAL CONNECTIONS BY OTHERS

ITEM TOTAL: \$17,281.55

Item Qty

Description

3 1 ea CASH REGISTER STAND



Model No. 37015

4-Series Signature Server® with Stainless Steel Countertops, 34" high ADA Cashier Station, 28"W, 28"D, modular, without cashier drawer, operator side open with stainless steel floor, NSF (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 1 year warranty against defects in materials & workmanship

1 st SS4CASTERS 4-Series Signature Server® Swivel Casters, 4"H, (2) braked, standard

1 ea 36697 All Stainless finish for 4-Series Signature Server® with stainless steel countertops, Cashier Station (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 3752150-2-C 4-Series Signature Server® V-rib Tray Slide, for customer side, 28"W x 12"D, fold-down/lift-off brackets (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 36945 4-Series Signature Server® Cash Drawer, locking, drawer bell, steel construction, black powder coated finish, includes: ABS plastic removable money tray, with (5) coins & (5) bills capacity, stainless steel bill clips/hold-downs, aluminum coin breaking plate (Refer to vollrathfoodservice.com for full warranty policy)

1 ea With cord cutouts

1 ea DUSIP Deliver, uncrate, set in place and make ready for FINAL CONNECTIONS BY OTHERS

ITEM TOTAL: \$4,592.15

Total \$69,654.17

This Quote shall be subject to TriMark's Terms of Sale <https://www.trimarkusa.com/SiteMedia/SiteResources/Terms/TriMark-Terms-and-Conditions-of-Sale.pdf>, which are incorporated herein by reference and shall govern. The parties specifically agree that no signature shall be required in order for this Quote or its applicable terms and conditions to be deemed legally binding and enforceable on Customer where the intent to be so bound can be inferred (including by acceptance or retention of products or services), notwithstanding contrary requirements under any law.

**Any tax or similar fees shown in this Quote are an estimate only.**

Florida Refrigeration License # CAC1821900

Austin	Baumont	Houston	Lewisville
TACLB52729R	TACLA35912C	TACLA108388C	TACLB16860C

Regulated by the Texas Department of Licensing and Regulation, P.O. BOX 12157,  
Austin, Texas, 1-800-803-9202. [www.tdlr.texas.gov](http://www.tdlr.texas.gov)

I understand, agree to and accept the above terms and conditions.

**Project:**  
Woodland Elementary School-  
Duke Equipment

**From:**  
KaTom Restaurant Supply, Inc.  
Nicholas King  
305 KaTom Drive  
Kodak, TN 37764  
(865) 225-1545 (Contact)

Job Reference Number: 75705

Thank you for the opportunity to provide this proposal.

Pricing is valid until 3/20/2024

Please note sales tax (if applicable) may not be included. If tax exempt, a signed Certificate of Exemption must be provided before an order is processed.

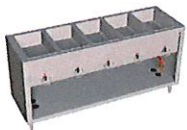
Special order (custom) & non-stocking items are not returnable & require 100% payment at time of order.

Items received by customer without report of damage are considered received in good condition and cannot be claimed as damaged after time of receipt.

If needed, delivery and limited installation by KaTom Restaurant Supply, Inc. will be quoted by your salesperson and noted as such on the quote.


Quote must be signed and returned to KaTom before an order is processed.

Item	Qty	Description	Sell	Sell Total
1	1 ea	<b>HOT FOOD SERVING COUNTER / TABLE</b> Duke Manufacturing Model No. E305-25SS AeroServ™ Hot Food Unit, electric, 74"W x 24.5"D, stainless steel top, (5) stainless steel heat wells, drains, copper manifolds, (1) valve, infinite controls, stainless steel body and undershelf, cULus, UL EPH Classified (NOTE: Electric values & plug configurations change for 3 phase or when adding electric options - Contact Factory for more info)	\$4,400.00	\$4,400.00
	1 ea	E30525-208-1 208v/60/1-ph, 4500 watts, 21.6 amps		
	1 st	ACA-SET4 Casters, set of 4, 5" dia. swivel type, all with brakes,	\$452.14	\$452.14



Item	Qty	Description	Sell	Sell Total
		polyurethane tire, in lieu of standard legs, this may require cord & plug option (cord & plug must be added to hot food units to meet U.L.)		
	1 ea	CORD 6 ft. cord & plug	\$40.42	\$40.42
	1 ea	MOD-14-2 14ga stainless steel top, in lieu of standard	\$142.88	\$142.88
	1 ea	SOLID-HD-5CU Tray Slide, customer's side, 74" W x 12-1/4" D, solid stainless steel, on hinged brackets, with (2) 1/8" die-formed rubbing tracks, * 30" high *	\$1,018.96	\$1,018.96
	1 ea	MOD-HT Special Height Body, per unit		
	1 ea	MOD-HT-32 32" Height Body		
	1 ea	TS560-74 Thurmaduke™ Designer Sneeze Guard, 73-3/4"W x 13"D x 18"H, service style, flip-up front glass, painted end panels & shelf & 1/4" acrylic end guards, cULus, UL EPH Classified	\$2,350.00	\$2,350.00
	1 ea	SSS Stainless Steel Shelf, in lieu of standard painted steel		
	1 ea	SSE Stainless Steel Ends, in lieu of standard painted steel	\$119.53	\$119.53
	1 ea	HL-5 Radiant Heater & Incandescent Light, under shelf & wired to base, 120v/60/1-ph (this may require cord & plug option)	\$1,789.76	\$1,789.76
			<b>ITEM TOTAL:</b>	<b>\$10,313.69</b>
2	1 ea	<b>SERVING COUNTER, COLD FOOD</b> Duke Manufacturing Model No. 327-25SS-N7 AeroServ™ Cold Pan Unit, 74"W x 24-1/2"D, stainless steel top, (5) pan size, self-contained refrigeration, 8" deep, 70-1/2"W x 21-3/4"D stainless liner, 1" brass drain & plug, stainless steel body & undershelf, cord & plug, 120v/60/1-ph, 1/3 HP, 6.78 amps, R448a, NEMA 5-15P, cULus, UL EPH Classified	\$8,501.20	\$8,501.20
	1 st	ACA-SET4 Casters, set of 4, 5" dia. swivel type, all with brakes, polyurethane tire, in lieu of standard legs, this may require cord & plug option (cord & plug must be added to hot food units to meet U.L.)	\$452.14	\$452.14
	1 ea	MOD-14-5 14ga stainless steel top, in lieu of standard	\$352.79	\$352.79
	1 ea	SOLID-HD-5CU Tray Slide, customer's side, 74" W x 12-1/4" D, solid stainless steel, on hinged brackets, with (2) 1/8" die-formed rubbing tracks, * 30" high *	\$1,018.96	\$1,018.96
	1 ea	MOD-HT Special Height Body, per unit		
	1 ea	MOD-HT-32 32" Height Body		
	1 ea	TS540-74 Thurmaduke™ Designer Sneeze Guard, 73-3/4"W x 13"D x 18"H, self-service style, painted end panels, 13" wide shelf & 1/4" acrylic end guards, cULus, UL EPH Classified	\$2,483.38	\$2,483.38
	1 ea	SSS Stainless Steel Shelf, in lieu of standard painted steel		
	1 ea	SSE Stainless Steel Ends, in lieu of standard painted steel	\$119.53	\$119.53
	1 ea	LED-5 LED light under shelf, wired to base, 120v/60/1-ph (this may require cord & plug option)	\$1,396.08	\$1,396.08
	1 ea	CORD 6 ft. cord & plug	\$40.42	\$40.42
			<b>ITEM TOTAL:</b>	<b>\$14,364.50</b>



Item	Qty	Description	Sell	Sell Total
3	1 ea	<b>CASH REGISTER STAND</b> Duke Manufacturing Model No. 306-25SS AeroServ™ Cashier Stand Unit, 24-1/2"W x 24-1/2"D, stainless steel top, stainless steel body & undershelf	\$1,912.90	\$1,912.90
				
	1 st	ACA-SET4 Casters, set of 4, 5" dia. swivel type, all with brakes, polyurethane tire, in lieu of standard legs, this may require cord & plug option (cord & plug must be added to hot food units to meet U.L.)	\$452.14	\$452.14
	1 ea	CS-DR-LK Stainless steel drawer, with lock and keys, for cashier stand	\$539.56	\$539.56
	1 ea	MOD-14-1 14ga stainless steel top, in lieu of standard	\$118.37	\$118.37
	1 ea	CUT-OP1-G Round cutout with grommet, in counter top, for cord pass	\$85.88	\$85.88
	1 ea	SOLID-HD-24.5CL Tray Slide, cashier's left, solid stainless steel, on hinged brackets, with (2) 1/8" die-formed rubbing tracks, * 30" high *	\$640.59	\$640.59
	1 ea	CORD 6 ft. cord & plug	\$40.42	\$40.42
	1 ea	E-OP2 Electric outlet, mounted in base, with galvanized junction box, duplex or single receptacle & stainless steel cover, wired to existing power source	\$261.32	\$261.32
	1 ea	MOD-HT Special Height Body, per unit		
	1 ea	MOD-HT-32 32" Height Body		
			<b>ITEM TOTAL:</b>	<b>\$4,051.18</b>
4	1 ea	KaTom Model No. FREIGHT FREIGHT	\$2,033.19	\$2,033.19
			<b>ITEM TOTAL:</b>	<b>\$2,033.19</b>
5	1 ea	KaTom Model No. INSTALLATION INSTALLATION-- uncrate, deliver, and set in place (no final connections will be made)	\$1,255.89	\$1,255.89
			<b>ITEM TOTAL:</b>	<b>\$1,255.89</b>
			Total	\$32,018.45

Thank you for the opportunity to provide this proposal.

Special order (custom) & non-stocking items are not returnable & require 100% payment at time of order.

Approved returns are subject to a 25% re-stock fee plus all shipping costs associated.

Quote must be signed and returned to KaTom before an order is processed.

**\*\*Buyer is responsible for reading and verifying all notes\*\***

This quotation is based on our understanding of the information furnished to us by the Manufacturer(s). While we make every effort to ensure that the quote is correct we are not responsible for this quotation meeting your requirements based on incorrect or incomplete information. Please check our quotation carefully. Anything not listed will not be furnished.

Installation of contracted goods includes: unloading, uncrating, assembly and set in place as per approved drawings, leveling, fastening and sealing of contracted goods.

Excludes, unless specifically noted: All inter and final utility connections and/or disconnections including but not limited to all accessory plumbing and electrical components, electrical control panels, switches, valves, manifolds, faucets, drains, etc.. (By GC or related sub contractor). Dumpster/trash receptacle for any garbage or debris related to the equipment and it's installation (By GC)

Due to supply chain volatility, some items will have extended lead times and possible cost increases. We will relay any updates regarding delays in manufacture and cost increases incurred by this volatility.

Warehousing fees based upon storage of items from time of receipt until projected delivery date. Any storage past the projected delivery date will incur fees of 10% of total job cost per month non-prorated starting on the first day of receipt in the warehouse.

Special Invoicing/Project system costs, such as Textura or Procore, are not included in price unless specifically notated.

Product warranties will begin at time of start up.

Acceptance: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_



# Quote

02/20/2024

**Project:**  
Woodland Elementary School -  
Vollrath Equipment

**From:**  
KaTom Restaurant Supply, Inc.  
Dylan Bowen  
305 KaTom Drive  
Kodak, TN 37764

Job Reference Number: 75687

Thank you for the opportunity to provide this proposal.

Pricing is valid until 3/20/2024

Please note sales tax (if applicable) may not be included. If tax exempt, a signed Certificate of Exemption must be provided before an order is processed.

Special order (custom) & non-stocking items are not returnable & require 100% payment at time of order.

Items received by customer without report of damage are considered received in good condition and cannot be claimed as damaged after time of receipt.

If needed, delivery and limited installation by KaTom Restaurant Supply, Inc. will be quoted by your salesperson and noted as such on the quote.

Quote must be signed and returned to KaTom before an order is processed.

Item	Qty	Description	Sell	Sell Total
1	1 ea	<b>HOT FOOD SERVING COUNTER / TABLE</b> Vollrath Model No. 36150	\$6,398.02	\$6,398.02
		4-Series Signature Server® Hot Food Serving Counter, 74"W x 28"D x 30"H, 18/300 stainless steel top with 1" turndown on all sides, (5) 12" x 20" x 6-3/8" deep wells with 625 watt elements, individual Touch-Temp® programmable controls, enclosed base, 18/400 series stainless steel unibody construction, pull-out ball valve drain, 3125 watts, cord, plug, cULus, NSF, Made in USA (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	1 year warranty against defects in materials & workmanship		



Item	Qty	Description	Sell	Sell Total
	1 ea	208v/60/1-ph		
	1 ea	9876910 Infinite Dial Controls, with power indicator lights, for 4-Series Signature Server® Counter with (5) hot wells, 208/240v (Refer to vollrathfoodservice.com for full warranty policy)	\$231.71	\$231.71
	1 ea	36695 All Stainless finish for 4-Series Signature Server® with stainless steel countertops, 74"W models (Refer to vollrathfoodservice.com for full warranty policy)	\$920.97	\$920.97
	1 ea	89283 Traditional Breath Guard, single-sided buffet with top shelf, 1/4 thick tempered glass secured in thick fitting channel with 1-1/2" extruded aluminum, for use with Vollrath (5) well 4-Series Signature Server® with stainless steel countertops, units, mount to stainless steel solid surface (note: requires 14 gauge stainless steel solid surface), 1-year warranty, Made in USA, contact Vollrath for dimensions (Refer to vollrathfoodservice.com for full warranty policy)	\$2,983.17	\$2,983.17
	1 ea	9879205 Upgrade to 14 gauge stainless steel work surface for, (5) well 74"W 4-Series Signature Server® Hot Food Base (required for this breath guard)	\$572.61	\$572.61
	1 ea	99 Aluminum finish, standard		
	1 ea	08 Cayenne® Incandescent Lighting Strip, for (5) well Traditional breath guard, onboard control with toggle, adjustable reflectors, aluminum construction (Refer to vollrathfoodservice.com for full warranty policy)	\$1,087.52	\$1,087.52
	1 ea	3751450-2-O Operator Side- Plate Rest - with lift-off bracket, ADA 4-Series Signature Server® with Stainless Steel Countertops, 74"W x 7"D (Refer to vollrathfoodservice.com for full warranty policy)	\$738.48	\$738.48
	1 ea	375241450-2-C 4-Series Signature Server® V-rib Tray Slide, for customer side, 74"W x 12"D, fold-down/lift-off brackets, 14/300 series stainless steel (Refer to vollrathfoodservice.com for full warranty policy)	\$911.78	\$911.78
	1 st	SS4CASTERS 4-Series Signature Server® Swivel Casters, 4"H, (2) braked, standard		
			<b>ITEM TOTAL:</b>	<b>\$13,844.26</b>

2	1 ea	<b>SERVING COUNTER, COLD FOOD</b>	\$7,416.33	\$7,416.33
---	------	-----------------------------------	------------	------------



Vollrath Model No. 36176

4-Series Signature Server® Stainless Steel Countertop with NSF7 Cold Station, self contained refrigeration, 74"W x 28"D x 30"H, Bloomington-style recessed well displays pans 3" below work surface, coils surround sidewalls, accommodates 6" deep pans, polyurethane foam insulation, standard well drains, seamless display pan well opening 63"W x 19-7/8"D x 6-5/8" deep, 1/3 HP, 7.2 amps, NEMA 5-15P, 120v/60/1-ph, cULus, NSF, Made in USA (Refer to vollrathfoodservice.com for full warranty policy)

1 ea 1 year warranty against defects in materials & workmanship

1 st SS4CASTERS 4-Series Signature Server® Swivel Casters, 4"H, (2) braked, standard

Item	Qty	Description	Sell	Sell Total
	1 ea	36695 All Stainless finish for 4-Series Signature Server® with stainless steel countertops, 74"W models (Refer to vollrathfoodservice.com for full warranty policy)	\$920.97	\$920.97
	1 ea	89283 Traditional Breath Guard, single-sided buffet with top shelf, 1/4 thick tempered glass secured in thick fitting channel with 1-1/2" extruded aluminum, for use with Vollrath (5) well 4-Series Signature Server® with stainless steel countertops, units, mount to stainless steel solid surface (note: requires 14 gauge stainless steel solid surface), 1-year warranty, Made in USA, contact Vollrath for dimensions (Refer to vollrathfoodservice.com for full warranty policy)	\$2,983.17	\$2,983.17
	1 ea	9879305 Upgrade to 14 gauge stainless steel work surface for, 74"W 4-Series Signature Server® Cold Pan (required for this breath guard)	\$600.76	\$600.76
	1 ea	99 Aluminum finish, standard		
	1 ea	93 Fluorescent Lighting Strip, for (5) well Contemporary breath guard, power switch in breath guard (bulbs not included) (Refer to vollrathfoodservice.com for full warranty policy)	\$1,697.29	\$1,697.29
	1 ea	120v/60/1-ph		
	1 ea	3751450-2-O Operator Side- Plate Rest - with lift-off bracket, ADA 4-Series Signature Server® with Stainless Steel Countertops, 74"W x 7"D (Refer to vollrathfoodservice.com for full warranty policy)	\$738.48	\$738.48
	1 ea	3752450-2-C 4-Series Signature Server® V-rib Tray Slide, for customer side, 74"W x 12"D, fold-down/lift-off brackets (Refer to vollrathfoodservice.com for full warranty policy)	\$911.78	\$911.78
			<b>ITEM TOTAL:</b>	<b>\$15,268.78</b>
3	1 ea	<b>CASH REGISTER STAND</b> Vollrath Model No. 37015 4-Series Signature Server® with Stainless Steel Countertops, 34" high ADA Cashier Station, 28"W, 28"D, modular, without cashier drawer, operator side open with stainless steel floor, NSF (Refer to vollrathfoodservice.com for full warranty policy)	\$1,499.01	\$1,499.01
	1 ea	1 year warranty against defects in materials & workmanship		
	1 st	SS4CASTERS 4-Series Signature Server® Swivel Casters, 4"H, (2) braked, standard		
	1 ea	36697 All Stainless finish for 4-Series Signature Server® with stainless steel countertops, Cashier Station (Refer to vollrathfoodservice.com for full warranty policy)	\$697.99	\$697.99
	1 ea	3752150-2-C 4-Series Signature Server® V-rib Tray Slide, for customer side, 28"W x 12"D, fold-down/lift-off brackets (Refer to vollrathfoodservice.com for full warranty policy)	\$531.51	\$531.51
	1 ea	36945 4-Series Signature Server® Cash Drawer, locking, drawer bell, steel construction, black powder coated finish, includes: ABS plastic removable money tray, with (5) coins & (5) bills capacity, stainless steel bill clips/hold downs, aluminum coin breaking plate (Refer to vollrathfoodservice.com for full warranty policy)	\$606.57	\$606.57



Item	Qty	Description	Sell	Sell Total
	1 ea	With cord cutouts	\$522.87	\$522.87
			<b>ITEM TOTAL:</b>	<b>\$3,857.95</b>
4	1 ea	KaTom Model No. FREIGHT FREIGHT	\$2,985.07	\$2,985.07
			<b>ITEM TOTAL:</b>	<b>\$2,985.07</b>
5	1 ea	KaTom Model No. INSTALLATION INSTALLATION-- uncrate, deliver, and set in place (no final connections will be made)	\$1,243.33	\$1,243.33
			<b>ITEM TOTAL:</b>	<b>\$1,243.33</b>
			<b>Total</b>	<b>\$37,199.39</b>

Thank you for the opportunity to provide this proposal.

Special order (custom) & non-stocking items are not returnable & require 100% payment at time of order.

Approved returns are subject to a 25% re-stock fee plus all shipping costs associated.

Quote must be signed and returned to KaTom before an order is processed.

**\*\*Buyer is responsible for reading and verifying all notes\*\***

This quotation is based on our understanding of the information furnished to us by the Manufacturer(s). While we make every effort to ensure that the quote is correct we are not responsible for this quotation meeting your requirements based on incorrect or incomplete information. Please check our quotation carefully. Anything not listed will not be furnished.

Installation of contracted goods includes: unloading, uncrating, assembly and set in place as per approved drawings, leveling, fastening and sealing of contracted goods.

Excludes, unless specifically noted: All inter and final utility connections and/or disconnections including but not limited to all accessory plumbing and electrical components, electrical control panels, switches, valves, manifolds, faucets, drains, etc.. (By GC or related sub contractor). Dumpster/trash receptacle for any garbage or debris related to the equipment and it's installation (By GC)

Due to supply chain volatility, some items will have extended lead times and possible cost increases. We will relay any updates regarding delays in manufacture and cost increases incurred by this volatility.

Warehousing fees based upon storage of items from time of receipt until projected delivery date. Any storage past the projected delivery date will incur fees of 10% of total job cost per month non-prorated starting on the first day of receipt in the warehouse.

Special Invoicing/Project system costs, such as Textura or Procure, are not included in price unless specifically notated.

Product warranties will begin at time of start up.

Acceptance: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_

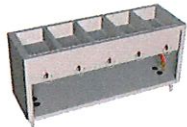
**:**  
 Culinx  
 Casey McClure  
 1802 First Ave S  
 PO Box 2925  
 Knoxville, TN 37932  
 701-232-4428  
 865-350-5012 (Contact)



**:**  
 Woodland Elementary School-  
 Duke  
 168 Manhattan Ave  
 Oak Ridge, TN 37830

**From:**  
 Culinx  
 Casey McClure  
 Knoxville, TN 37932  
 cmcclure@goculinax.com  
 C: 865-350-5012  
 O: 1-800-437-4076

NOTE: ITEMS QUOTED ARE POSSIBLY ALTERNATES TO THE SUPPLIED SPECIFICATIONS AND PLAN VIEW DRAWING. ALL PRICING SUBJECT TO CHANGE UPON RECEIPT OF ELEVATION VEW AND DETAIL VIEW DRAWING. ALL ITEMS ARE QUOTED USING DUKE MANUFACTURING'S STANDARDS OF MATERIALS, DESIGN AND CRAFTSMANSHIP.

Item	Qty	Description	Sell	Sell Total
1	1 ea	<b>HOT FOOD SERVING COUNTER / TABLE</b> Duke Manufacturing Model No. E305-25SS AeroServ™ Hot Food Unit, electric, 74"W x 24.5"D, stainless steel top, (5) stainless steel heat wells, drains, copper manifolds, (1) valve, infinite controls, stainless steel body and undershelf, cULus, UL EPH Classified (NOTE: Electric values & plug configurations change for 3 phase or when adding electric options - Contact Factory for more info)	\$12,380.97	\$12,380.97
	1 ea	E30525-208-1 208v/60/1-ph, 4500 watts, 21.6 amps		
	1 st	ACA-SET4 Casters, set of 4, 5" dia. swivel type, all with brakes, polyurethane tire, in lieu of standard legs, this may require cord & plug option (cord & plug must be added to hot food units to meet U.L.)		
	1 ea	CORD 6 ft. cord & plug		
	1 ea	MOD-14-2 14ga stainless steel top, in lieu of standard		
	1 ea	SOLID-HD-5CU Tray Slide, customer's side, 74" W x 12-1/4" D, solid stainless steel, on hinged brackets, with (2) 1/8" die-formed rubbing tracks, * 30" high *		
	1 ea	MOD-HT Special Height Body, per unit		
	1 ea	MOD-HT-32 32" Height Body		
	1 ea	TS560-74 Thurmaduke™ Designer Sneeze Guard, 73-3/4"W x 13"D x 18"H, service style, flip-up front glass, painted end panels & shelf & 1/4" acrylic end guards, cULus, UL EPH Classified		
	1 ea	SSS Stainless Steel Shelf, in lieu of standard painted steel		
	1 ea	SSE Stainless Steel Ends, in lieu of standard painted steel		
	1 ea	HL-5 Radiant Heater & Incandescent Light, under shelf & wired to base, 120v/60/1-ph (this may require cord & plug option)		
		<b>ITEM TOTAL:</b>		<b>\$12,380.97</b>



Item	Qty	Description	Sell	Sell Total
2	1 ea	<b>SERVING COUNTER, COLD FOOD</b>  Duke Manufacturing Model No. 327-25SS-N7 AeroServ™ Cold Pan Unit, 74"W x 24-1/2"D, stainless steel top, (5) pan size, self-contained refrigeration, 8" deep, 70-1/2"W x 21-3/4"D stainless liner, 1" brass drain & plug, stainless steel body & undershelf, cord & plug, 120v/60/1-ph, 1/3 HP, 6.78 amps, R448a, NEMA 5-15P, CULus, UL EPH Classified 1 st ACA-SET4 Casters, set of 4, 5" dia. swivel type, all with brakes, polyurethane tire, in lieu of standard legs, this may require cord & plug option (cord & plug must be added to hot food units to meet U.L.) 1 ea MOD-14-5 14ga stainless steel top, in lieu of standard 1 ea SOLID-HD-5CU Tray Slide, customer's side, 74" W x 12-1/4" D, solid stainless steel, on hinged brackets, with (2) 1/8" die-formed rubbing tracks, * 30" high * 1 ea MOD-HT Special Height Body, per unit 1 ea MOD-HT-32 32" Height Body 1 ea TS540-74 Thurmduke™ Designer Sneeze Guard, 73-3/4"W x 13"D x 18"H, self-service style, painted end panels, 13" wide shelf & 1/4" acrylic end guards, cULus, UL EPH Classified 1 ea SSS Stainless Steel Shelf, in lieu of standard painted steel 1 ea SSE Stainless Steel Ends, in lieu of standard painted steel 1 ea LED-5 LED light under shelf, wired to base, 120v/60/1-ph (this may require cord & plug option) 1 ea CORD 6 ft. cord & plug	\$16,344.25	\$16,344.25
			<b>ITEM TOTAL:</b>	<b>\$16,344.25</b>
3	1 ea	<b>CASH REGISTER STAND</b>  Duke Manufacturing Model No. 306-25SS AeroServ™ Cashier Stand Unit, 24-1/2"W x 24-1/2"D, stainless steel top, stainless steel body & undershelf 1 st ACA-SET4 Casters, set of 4, 5" dia. swivel type, all with brakes, polyurethane tire, in lieu of standard legs, this may require cord & plug option (cord & plug must be added to hot food units to meet U.L.) 1 ea CS-DR-LK Stainless steel drawer, with lock and keys, for cashier stand 1 ea MOD-14-1 14ga stainless steel top, in lieu of standard 1 ea CUT-OP1-G Round cutout with grommet, in counter top, for cord pass 1 ea SOLID-HD-24.5CL Tray Slide, cashier's left, solid stainless steel, on hinged brackets, with (2) 1/8" die-formed rubbing tracks, * 30" high * 1 ea CORD 6 ft. cord & plug 1 ea E-OP2 Electric outlet, mounted in base, with galvanized junction box, duplex or single receptacle & stainless steel cover, wired to existing	\$4,436.22	\$4,436.22

Item	Qty	Description	Sell	Sell Total
		power source		
	1 ea	MOD-HT Special Height Body, per unit		
	1 ea	MOD-HT-32 32" Height Body		
			<b>ITEM TOTAL:</b>	<b>\$4,436.22</b>
4	1 ea	<b>SHIPPING</b>	\$875.00	\$875.00
		Duke Manufacturing Shipping		
			<b>ITEM TOTAL:</b>	<b>\$875.00</b>
5	1 ea	<b>DELIVERY</b>	\$600.00	\$600.00
		Duke Manufacturing Uncrate, Deliver to Woodland Elementary, and set in place		
			<b>ITEM TOTAL:</b>	<b>\$600.00</b>

Subtotal	\$34,636.44
Total	\$34,636.44



For Instant Quotes click here:  
[Restaurant Equipment Financing](#)

For more information:  
 email: [FoodService@LeaseQ.com](mailto:FoodService@LeaseQ.com)  
 phone: (781) 328-9511

**Finance-to-Own**

24-month term:  
 \$1,577.83 - \$1,658.67\*

36-month term:  
 \$1,100.78 - \$1,185.85\*

48-month term:  
 \$863.35 - \$952.05\*

60-month term:  
 \$721.72 - \$813.82\*

\*These examples reflect actual payment ranges that businesses with more than 2 years in business receive. Payments will vary depending on the established business and personal credit.  
 Financing is available for Start-Ups. Payments do not include taxes.

Prices Good Until: 04/23/2024

\*When placing an order based on this quotation please provide quote number and job name on order\*

**\*Please note that freight is not included in this quotation\***

\*ITEMS ARE QUOTED AT FACTORY STANDARD DISCOUNT \*

DUKE-----50%

-----  
NOTE: PLEASE COMPARE THIS QUOTATION TO YOUR REQUIRED EQUIPMENT SPECIFICATIONS.

NOTE: IT IS THE RESPONSIBILITY OF THE DEALER TO VERIFY ALL MEASUREMENTS, DIRECTION OF OPERATION, VOLTAGES AND UTILITY SPECIFICATIONS PRIOR TO ORDERING.

NOTE: EQUIPMENT NOT SHOWN ON THIS QUOTATION WILL NOT BE INCLUDED.

NOTE: PLEASE VERIFY CORRECT QUANTITIES PER SPECS AND DRAWINGS.

**Terms of Sale:**

The risk in the Goods shall pass to the Buyer on delivery, but the title to the goods shall remain vested in the Seller until the Seller has received payment in full in cleared funds. Do not give carrier clear receipt if you find shipment damaged or short. Receipt from carrier ends our responsibility. Please make claim with carrier. Do not deduct from invoice. A finance charge of 1.5% per month will be added to all amounts beyond terms. This is an annual percentage rate of 18%. Minimum finance charge is \$.50. All orders, including orders with non-stock items require a minimum 50% down payment. Credit card payments may incur a fee.

I understand and agree to these terms.

Initial \_\_\_\_\_

**Returns:**

All regular stocking items may be returned for full credit in new un-used condition in the original packaging. Non-stock or special order items may be returned provided the factory will take them back in new un-used condition in original packaging. A restocking charge (30% minimum) plus any return freight charges incurred will be applied to your account. Custom fabrication or made to order items may not be returned for credit. All items must be returned within 30 days of invoice. I understand and agree to the returns policy.

Initial \_\_\_\_\_

Acceptance: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Date: \_\_\_\_\_

Acceptance: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_



# Estimate

02/20/2024

:  
Woodland Elementary School-  
Vollrath

**From:**  
CulinaX  
Casey McClure  
Knoxville, TN 37932  
cmclure@goculinaX.com  
C: 865-350-5012  
O: 1-800-437-4076

Job Reference Number: 53204

**This quote and pricing is effective on 01-01-2024. All PRICES ARE SUBJECT TO CHANGE without notice; and orders placed for future delivery will be invoiced at the prices in effect at the time of shipment.**

**All purchase order (PO) pricing must match, or orders will not be released for shipment.**

**Standard Terms and Conditions apply as stated on the Vollrath Website at <https://vollrathcompany.com/terms-of-sale/>.**

**Prepaid freight with \$5,000 net order on standard catalog items. Dedicated trucks and crating charges apply to all Custom V-Class orders.**

**A \$5.00 broken case charge will be added for each broken case.**

**A \$15.00 minimum order charge will be added to orders under \$100.00 NET.**

**NOTE: Non-returnable items include, but are not limited to, ware washing racks, Lid Saver, heat strips, plate covers and custom made or MTO-made to order products. All other items incur a 25% re-stocking fee.**

Item	Qty	Description	Sell	Sell Total
1	1 ea	<b>HOT FOOD SERVING COUNTER / TABLE</b> Vollrath Model No. 36150 4-Series Signature Server® Hot Food Serving Counter, 74"W x 28"D x 30"H, 18/300 stainless steel top with 1" turndown on all sides, (5) 12" x 20" x 6-3/8" deep wells with 625 watt elements, individual Touch-Temp® programmable controls, enclosed base, 18/400 series stainless steel unibody construction, pull-out ball valve drain, 3125 watts, cord,	\$13,798.55	\$13,798.55



Item	Qty	Description	Sell	Sell Total
		plug, cULus, NSF, Made in USA (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	1 year warranty against defects in materials & workmanship		
	1 ea	208v/60/1-ph		
	1 ea	9876910 Infinite Dial Controls, with power indicator lights, for 4-Series Signature Server® Counter with (5) hot wells, 208/240v (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	36695 All Stainless finish for 4-Series Signature Server® with stainless steel countertops, 74"W models (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	89283 Traditional Breath Guard, single-sided buffet with top shelf, 1/4 thick tempered glass secured in thick fitting channel with 1-1/2" extruded aluminum, for use with Vollrath (5) well 4-Series Signature Server® with stainless steel countertops, units, mount to stainless steel solid surface (note: requires 14 gauge stainless steel solid surface), 1-year warranty, Made in USA, contact Vollrath for dimensions (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	9879205 Upgrade to 14 gauge stainless steel work surface for, (5) well 74"W 4-Series Signature Server® Hot Food Base (required for this breath guard)		
	1 ea	99 Aluminum finish, standard		
	1 ea	08 Cayenne® Incandescent Lighting Strip, for (5) well Traditional breath guard, onboard control with toggle, adjustable reflectors, aluminum construction (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	3751450-2-O Operator Side- Plate Rest - with lift-off bracket, ADA 4-Series Signature Server® with Stainless Steel Countertops, 74"W x 7"D (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	3752450-2-C 4-Series Signature Server® V-rib Tray Slide, for customer side, 74"W x 12"D, fold-down/lift-off brackets (Refer to vollrathfoodservice.com for full warranty policy)		
	1 st	SS4CASTERS 4-Series Signature Server® Swivel Casters, 4"H, (2) braked, standard		
			<b>ITEM TOTAL:</b>	<b>\$13,798.55</b>
2	1 ea	<b>SERVING COUNTER, COLD FOOD</b> Vollrath Model No. 36176 4-Series Signature Server® Stainless Steel Countertop with NSF7 Cold Station, self contained refrigeration, 74"W x 28"D x 30"H, Bloomington-style recessed well displays pans 3" below work surface, coils surround sidewalls, accommodates 6" deep pans, polyurethane foam insulation, standard well drains, seamless display pan well opening 63"W x 19-7/8"D x 6-5/8" deep, 1/3 HP, 7.2 amps, NEMA 5-15P, 120v/60/1-ph, cULus, NSF, Made in USA (Refer to vollrathfoodservice.com for full warranty policy)	\$16,254.54	\$16,254.54



1 ea 1 year warranty against defects in materials & workmanship

Initial: \_\_\_\_\_

Item	Qty	Description	Sell	Sell Total
	1 st	SS4CASTERS 4-Series Signature Server® Swivel Casters, 4"H, (2) braked, standard		
	1 ea	36695 All Stainless finish for 4-Series Signature Server® with stainless steel countertops, 74"W models (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	89283 Traditional Breath Guard, single-sided buffet with top shelf, 1/4 thick tempered glass secured in thick fitting channel with 1-1/2" extruded aluminum, for use with Vollrath (5) well 4-Series Signature Server® with stainless steel countertops, units, mount to stainless steel solid surface (note: requires 14 gauge stainless steel solid surface), 1-year warranty, Made in USA, contact Vollrath for dimensions (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	9879305 Upgrade to 14 gauge stainless steel work surface for, 74"W 4-Series Signature Server® Cold Pan (required for this breath guard)		
	1 ea	99 Aluminum finish, standard		
	1 ea	93 Fluorescent Lighting Strip, for (5) well Contemporary breath guard, power switch in breath guard (bulbs not included) (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	120v/60/1-ph		
	1 ea	3751450-2-O Operator Side- Plate Rest - with lift-off bracket, ADA 4-Series Signature Server® with Stainless Steel Countertops, 74"W x 7"D (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	3752450-2-C 4-Series Signature Server® V-rib Tray Slide, for customer side, 74"W x 12"D, fold-down/lift-off brackets (Refer to vollrathfoodservice.com for full warranty policy)		
			<b>ITEM TOTAL:</b>	<b>\$16,254.54</b>

3	1 ea	<b>CASH REGISTER STAND</b> Vollrath Model No. 37015 4-Series Signature Server® with Stainless Steel Countertops, 34" high ADA Cashier Station, 28"W, 28"D, modular, without cashier drawer, operator side open with stainless steel floor, NSF (Refer to vollrathfoodservice.com for full warranty policy)	\$4,034.64	\$4,034.64
	1 ea	1 year warranty against defects in materials & workmanship		
	1 st	SS4CASTERS 4-Series Signature Server® Swivel Casters, 4"H, (2) braked, standard		
	1 ea	36697 All Stainless finish for 4-Series Signature Server® with stainless steel countertops, Cashier Station (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	3752150-2-C 4-Series Signature Server® V-rib Tray Slide, for customer side, 28"W x 12"D, fold-down/lift-off brackets (Refer to vollrathfoodservice.com for full warranty policy)		
	1 ea	36945 4-Series Signature Server® Cash Drawer, locking, drawer bell, steel construction, black powder coated finish, includes: ABS plastic removable money tray, with (5) coins & (5) bills capacity, stainless		



Item	Qty	Description	Sell	Sell Total
	1 ea	steel bill clips/hold downs, aluminum coin breaking plate (Refer to vollrathfoodservice.com for full warranty policy) With cord cutouts		
			<b>ITEM TOTAL:</b>	<b>\$4,034.64</b>
4	1 ea	<b>SHIPPING</b> Vollrath Shipping	\$500.00	\$500.00
			<b>ITEM TOTAL:</b>	<b>\$500.00</b>
5	1 ea	<b>DELIVERY</b> Vollrath Uncrate, Delivery to Woodland Elementary, and set in place	\$600.00	\$600.00
			<b>ITEM TOTAL:</b>	<b>\$600.00</b>

Subtotal	\$35,187.73
Total	\$35,187.73



For Instant Quotes click here:  
[Restaurant Equipment Financing](#)

For more information:  
 email: [FoodService@LeaseQ.com](mailto:FoodService@LeaseQ.com)  
 phone: (781) 328-9511

**Finance-to-Own**  
 24-month term:  
 \$1,602.94 - \$1,685.07\*  
 36-month term:  
 \$1,118.30 - \$1,204.72\*  
 48-month term:  
 \$877.09 - \$967.21\*  
 60-month term:  
 \$733.21 - \$826.77\*

\*These examples reflect actual payment ranges that businesses with more than 2 years in business receive. Payments will vary depending on the established business and personal credit.  
 Financing is available for Start-Ups. Payments do not include taxes.

Prices Good Until: 02/07/2024

**Terms of Sale:**

The risk in the Goods shall pass to the Buyer on delivery, but the title to the goods shall remain vested in the Seller until the Seller has received payment in full in cleared funds. Do not give carrier clear receipt if you find shipment damaged or short. Receipt from carrier ends our responsibility. Please make claim with carrier. Do not deduct from invoice. A finance charge of 1.5% per month will be added to all amounts beyond terms. This is an annual percentage rate of 18%. Minimum finance charge is \$.50. All orders, including orders with non-stock items require a minimum 50% down payment. Credit card payments may incur a fee.

I understand and agree to these terms.

Initial \_\_\_\_\_

**Returns:**

All regular stocking items may be returned for full credit in new un-used condition in the original packaging. Non-stock or special order items may be returned provided the factory will take them back in new un-used condition in original packaging. A restocking charge (30% minimum) plus any return freight charges incurred will be applied to your account. Custom fabrication or made to order items may not be returned for credit. All items must be returned within 30 days of invoice. I understand and agree to the returns policy.

Initial \_\_\_\_\_

Acceptance: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Date: \_\_\_\_\_

Acceptance: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_



Oak Ridge Schools  
Extended Childcare  
1450 Oak Ridge Turnpike  
Oak Ridge, TN 37830

Telephone (865)425-9007 or  
865-425-9145  
Fax: (865)425-9023  
[clwright@ortn.edu](mailto:clwright@ortn.edu)

Date: March 7, 2024

To: Mr. Lay, Executive Director of School Leadership

From: Cody Wright, Extended Child Care Coordinator

Subject: Metal Carport Structure

I am requesting approval to purchase a metal carport that will be used as a protective picnic structure allowing students to eat meals and complete schoolwork outside. The structure will be installed at Woodland Elementary and provide protection from heat and light rain. The total cost of this project is \$5660.00 and will be paid for using ECC Funds. Mr. Hobby and Mr. Thacker have reviewed and support this project. Your consideration to approve this project request is appreciated.

Respectfully,

Cody Wright

ECC Coordinator



## Permanent Structure of Facility Alteration Request Form

Date of Request: 11/1/2023

Location/Building: Woodland

Name of person or group making request: Cody Wright

Extended Child Care

Description of proposed project: Metal carport structure  
for a covered picnic area.

Total Project Cost: ~~\$5,405.00~~ \$5660.00

District/School Cost: Extended Child Care - to pay all cost.  
Dept.

Donated Amount: \_\_\_\_\_

Projected Operation/Maintenance Cost: \_\_\_\_\_

Name of Group or Individual making the donation:

\_\_\_\_\_

\_\_\_\_\_

People/Group that will do the work: Structure will be purchased  
from R&B Buildings Oak Ridge - David White

If contract labor will be used, please complete the following:

Name of Contractor: \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_

Background check of contracted labor has been verified by:

\_\_\_\_\_ Date: \_\_\_\_\_

Attach any pictures, diagrams or blueprints for the proposed project.

Approval Signatures:

Date	Title	Signature
11-2-23	Principal or Building Administrator	David T. White
2/29/24	Supervisor of Maintenance and Operations	Allen Archer
3/4/24	Executive Director of Business and Operations	Janice DeLoe
3/4/24	Executive Director of School Leadership	Bruce & Lisa
3-4-24	Superintendent of Schools	Bruce Buckner

**Project work may not begin prior to ORS Board of Education approval.**

Board Approval Date: \_\_\_\_\_



**R&R Buildings Oak Ridge**  
 100 Melton Lake Dr,  
 Oak Ridge, Anderson, Tennessee  
 37830  
 randrbldngs@gmail.com  
 (865) 567-1722  
 www.randrbldngsoakridge.com

**Sales: David White ABN User**  
 100 Melton Lake Drive  
 Oak Ridge, Tennessee 37830  
 amita@mailinator.com  
 (865) 567-1722

Building Quote  
**QTE-002104**  
 Date  
**02/29/2024**  
 Total  
**\$5,660.00**

**CUSTOMER DETAILS**

**Cody Wright**

Billing Address  
 352 east dr  
 Oak Ridge, Tennessee 37830  
 Shipping Address  
 352 east dr  
 Oak Ridge, Tennessee 37830  
 clwright@ortn.edu  
 (865) 567-1001

**Standard Carports - 24 x 35 x 12**

- Roof Color: Black
- Trim Color: White
- Slides/Ends Color: NA
- Door Color: NA
- Wainscot Color: NA



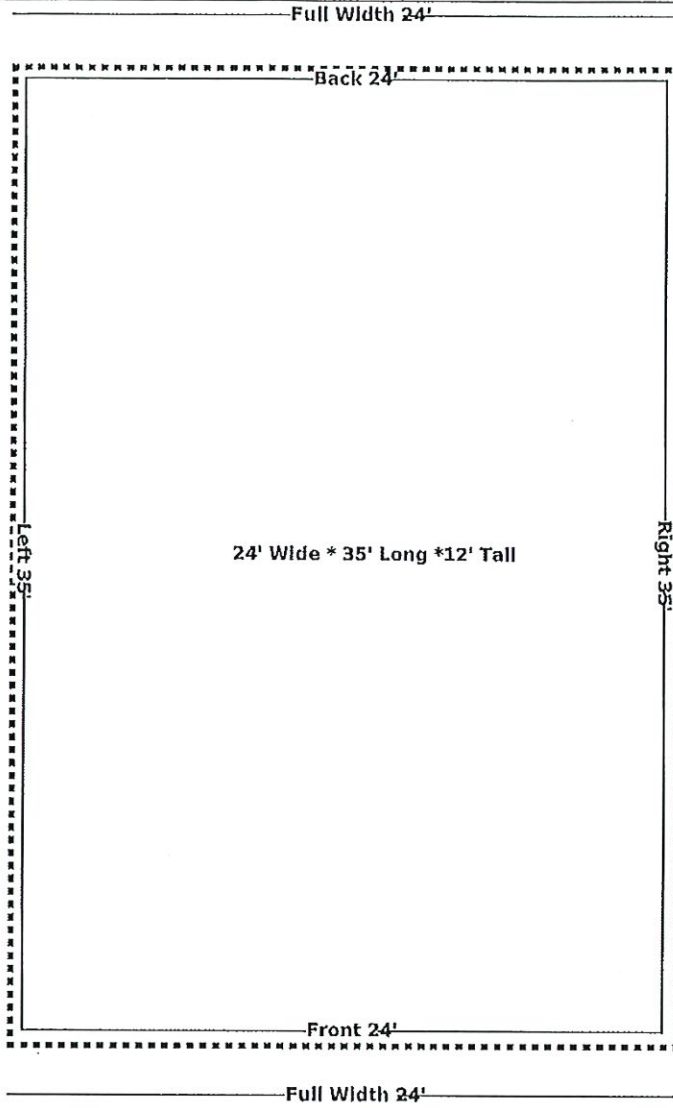
Ready for Installation? \_\_\_\_\_ Jobsite Level? Yes Permit Required? No Inside City Limit? \_\_\_\_\_ Electricity Available? Yes Installation Surface? Concrete

Building Dimension <b>24'W x35'L x12'H</b>	Roof Style <b>Vertical</b>	Gauge <b>14 Gauge</b>	Wind/Snow Rating <b>Built to Local Code</b>	Distance on Center <b>5 Feet</b>
---	-------------------------------	--------------------------	--	-------------------------------------

24X35' Vertical Roof	1	\$4,900.00
12' Height	1	\$760.00
Built to Local Code	1	\$0.00
3/12' Roof Pitch	1	\$0.00
Permit Required : No		
Installation Surface Levelled : Yes		
Electricity : Yes		
Please contact me, I have more questions about the building.	Yes	
I'm ready to buy, please contact me.	Yes	
Please quote this structure.	Yes	

**NOTES**

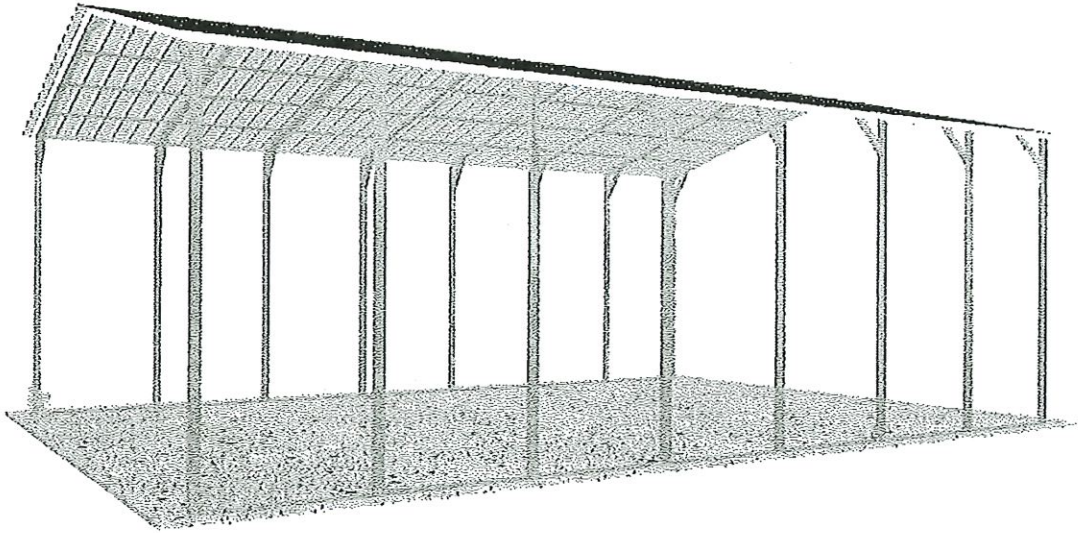
Building Amount:	\$5,660.00
Manufacturer Discount:	\$0.00
Sub Total:	\$5,660.00
Additional Charges	\$0.00
<b>Grand Total</b>	<b>\$5,660.00</b>
<b>Pay Now</b>	
<b>Downpayment</b>	<b>\$1,018.80</b>
<b>Balance Due</b>	<b>\$4,641.20</b>



**LEGENDS**

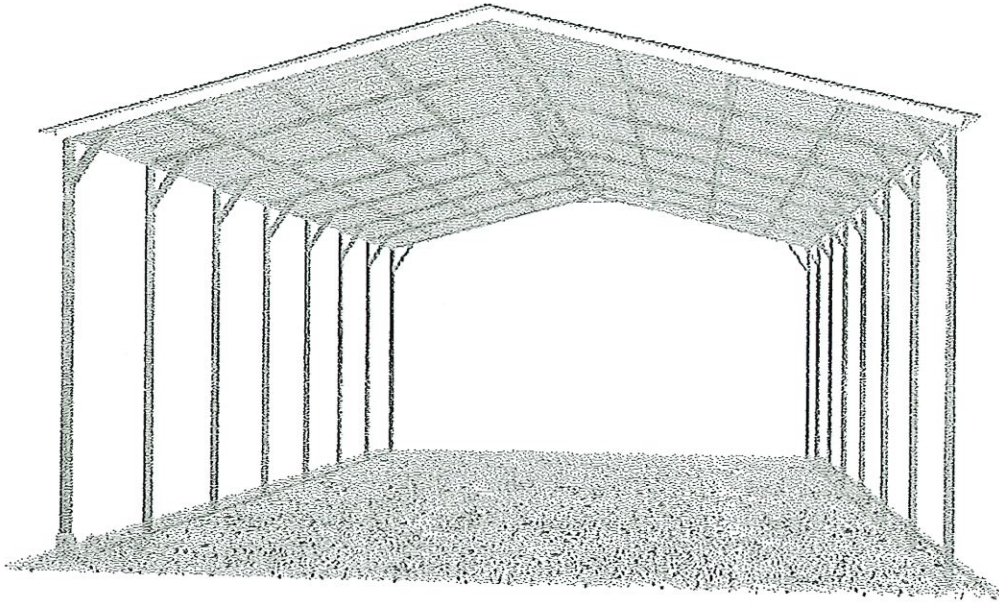
- ☐ Garage Door
- ☐ Garage Door Frameout
- ☐ Walk In Door
- ☐ Walk In Door Frameout
- ☐ Windows
- ☐ Windows Frameout
- ☐ Open Wall
- ☐ Close Wall
- ☐ Distance
- ☐ Storage Length (Utility)
- ☐ Cupola

**BUILDING VIEW**



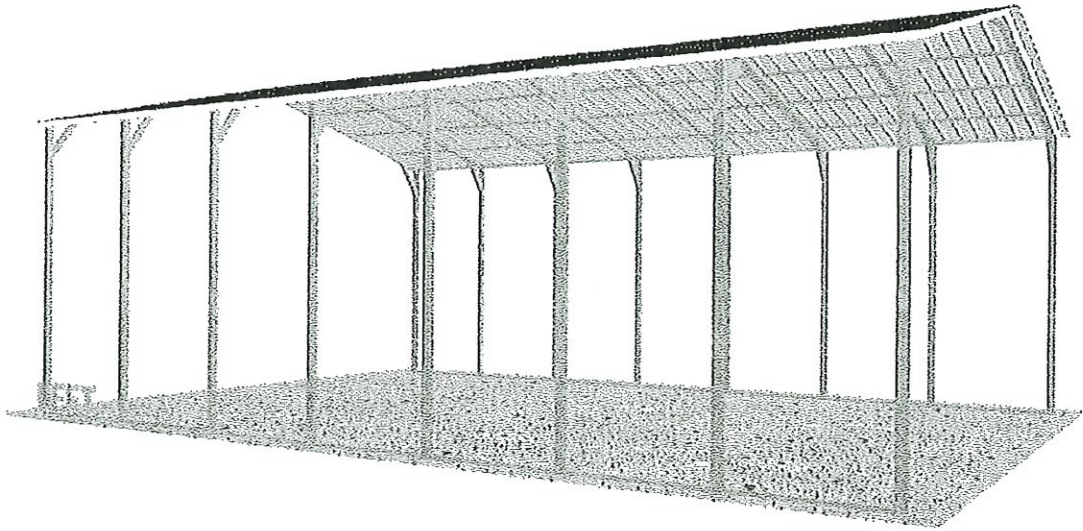
**RIGHT**

**BUILDING VIEW**



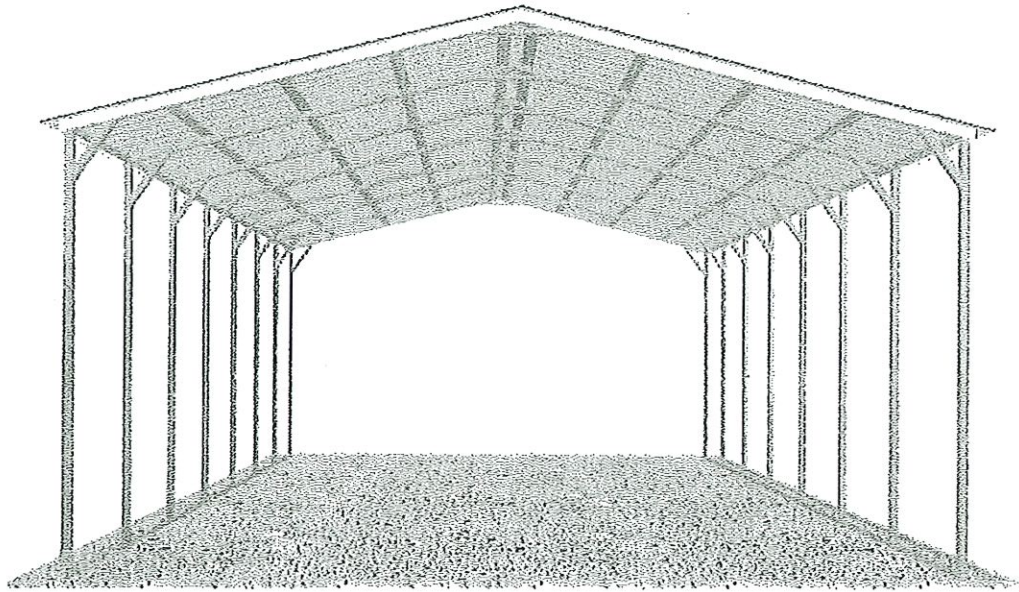
**BACK**

**BUILDING VIEW**



**LEFT**

**BUILDING VIEW**



**FRONT**



## MEMORANDUM

Dr. Kelly Williams

Executive Director, Office of Teaching and Learning

TO: Board of Education

DATE: 3/18/24

SUBJECT: Item for Action: Classroom Amplification for 3rd Grade Classrooms

I recommend the board approval of the attached quote from Lightspeed Technologies in the amount of \$36,710.00 to purchase classroom amplification systems for all grade 3 classrooms and each elementary school media center.

This project is included as part of ESSER 3 grant funds to enhance the new grade 3 classroom innovative spaces providing voice clarity for the teacher voice, but also enables the expansion and flexibility for evolving classroom needs. Instructional audio offers a powerful tool, supporting learning in the classroom and overcoming many barriers students and educators face.

Lightspeed Technologies Inc was selected after vetting and testing all three quoted systems in classroom settings. Based on teacher and staff feedback the Lightspeed's RedCat model was the preferred system. As RedCat is a sole source product the attached quote reflect the other systems tested that were not ultimately determined to be the best solution for our classroom needs.

# Oak Ridge Schools Competitive Quote Sheet

Work Order #

Vendor Name		Lightspeed Technologies Inc		Howard Technology Solution		Audio Enhancement		
Address		11509 SW Herman Rd Tualatin OR 97062		36 Howard Drive Ellisville MS 39437		9888 South Audio Drive West Jordan UT 84081		
Quote Number		Q-59169		CH5 1348091.00		114213		
Contact Name		Steve Bishop		Chris		Jeff Anderson		
Phone Number		800-732-8999		888-912-3151		800-383-9362		
Item	Qty	Description	Unit Price	Ext Price	Unit Price	Ext Price	Unit Price	Ext Price
RCN-FS-M	17	REDCAT W/FLEXMIKE, SHAREMIKE, AND MEDIA CONNECTOR	\$1,722.00	\$29,274.00				
RCNB-FS-M	4	REDCAT + BATTERY WITH FLEXMIKE, SHAREMIKE, AND MEDIA CONNECTOR	\$1,859.00	\$7,436.00				
1	21	XD TEACHER BOX WITH TEACHER PENDANT MICROPHONE	\$223.00	\$4,683.00				
2	21	BEAM (XD MICROPHONE, MOUNT, AND POWER SUPPLY NOT INCLUDED)	\$715.00	\$15,015.00				
3	21	CART MOUNT OPTION	\$272.00	\$5,712.00				
		SHIPPING & HANDLING	\$705.00	\$705.00				
ST-XD-9025	21	XD TEACHER BOX WITH TEACHER PENDANT MICROPHONE					\$264.08	\$5,545.68
XD-1301	21	BEAM (XD MICROPHONE, MOUNT, AND POWER SUPPLY NOT INCLUDED)					\$736.39	\$15,464.19
AC-3076	21	CART MOUNT WITH POWER SUPPLY FOR BEAM					\$351.26	\$7,376.46
		SHIPPING & HANDLING					\$1,052.56	\$1,052.56
		Req. No.						
Shipping and Handling			\$3,581.00	\$36,710.00	\$1,915.00	\$26,115.00	\$1,351.73	\$29,438.89
Quote taken by: Heather Henderlight								
<b>Total:</b>				<b>\$36,710.00</b>		<b>\$26,115.00</b>		<b>\$29,438.89</b>
Terms:								
Delivery Date:								
FOB Point:								

# QUOTATION

**Lightspeed Technologies, Inc.**

11509 SW Herman Road

Tualatin OR 97062

1-800-732-8999

[www.lightspeed-tek.com](http://www.lightspeed-tek.com)

Fax: 503-684-3197

Quote # Q-59169

Date: 1/16/2024

Expires: 3/16/2024

Payment Terms: Net 30

Shipping Method: Best Way

Account Executive: Steve Bishop

**BILL TO:**

ACCOUNTS PAYABLE  
OAK RIDGE SCHOOL DISTRICT  
PO BOX 6588  
OAK RIDGE, TN 37831-6588  
UNITED STATES

**SHIP TO:**

OAK RIDGE SCHOOL DISTRICT  
304 NEW YORK AVE  
OAK RIDGE, TN 37831-6588  
UNITED STATES

ITEM	DESCRIPTION	QTY	UNIT PRICE	AMOUNT
RCN-FS-M	REDCAT WITH FLEXMIKE, SHAREMIKE AND MEDIA CONNECTOR	17	\$1,722.00	\$29,274.00
RCNB-FS-M	REDCAT + BATTERY WITH FLEXMIKE, SHAREMIKE AND MEDIA CONNECTOR	4	\$1,859.00	\$7,436.00
<b>SUBTOTAL:</b>				\$36,710.00
<b>SALES TAX:</b>				\$0.00
<b>SHIPPING &amp; HANDLING:</b>				\$0.00
<b>TOTAL DUE:</b>				\$36,710.00

Please email your purchase order to BuyBoard at [info@buyboard.com](mailto:info@buyboard.com). Each purchase order must reference contract 'BuyBoard #653-21'. Shipping and handling charges are included with BuyBoard pricing.

Lightspeed instructional audio systems have a 5-year limited warranty on the major components.  
The lapel & earset mics, cables, SMA, FMA, FMCA and microphone batteries have a 1-year limited warranty.  
The L14V battery has a 1-year limited warranty.

**Thank you for choosing Lightspeed Technologies!**



Lightspeed Technologies, Inc.  
11509 SW Herman Road  
Tualatin, OR 97062

lightspeed-tek.com  
800.732.8999 Toll Free  
503.684.3197 Fax

September 2021

RE: Redcat Sole Source Letter

To Whom It May Concern

Please be advised that Lightspeed Technologies is the manufacturer and "Sole Source" provider of the Redcat Instructional Audio System with Access Technology. Lightspeed sells this product direct to schools and districts and does not make the product available through resellers unless the school district requires that channel. Lightspeed offers a 5-year warranty on the Redcat system and a 2-year warranty on the Redcat battery pack.

The Redcat system provides not only voice clarity for crystal clear audio of the Teacher's voice, but also enables the expansion and flexibility for evolving classroom needs. It eliminates interference while giving students access to everything the teacher is saying.

- Access Technology compatible with Activate speaker pods for small group instruction
- Supports team teaching
- No interference with other classroom technologies
- Operation in large, open areas
- Batteries will support a full day in the classroom
- 1-year warranty on microphone and Pod battery packs

Best regards,

A handwritten signature in black ink, appearing to read "Shaun Fagan".

Shaun Fagan

VP of Product Development

Lightspeed Technologies, Inc.

# 6

## Reasons Instructional Audio Benefits Teachers and Students

1

### Overcome High Ambient Noise Levels

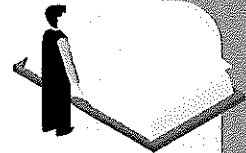
Instructional audio systems help overcome ambient noise levels and distribute the teacher's voice at the same level throughout the classroom, allowing students to hear the teacher regardless of where they are seated.



2

### Improve Attention and Time on Task

When a teacher's voice is amplified 5 to 15 decibels above ambient noise, articulation and speech intelligibility are enhanced, better capturing students' attention and suppressing their sensitivity to the sounds and movements within the classroom.



3

### Increase Class Interaction and Participation<sup>1</sup>

Students become motivated to participate in classrooms that use an instructional audio system because they have a consistent understanding of expectations, leading to an increase in enthusiasm and a greater desire to read out loud or give oral reports.



4

### Reduce Behavior Problems

The use of instructional audio can reduce stress within the classroom, resulting in a decrease in behavior problems, better responses to verbal correction and easier overall management and control of classrooms.



5

### Diminish Teachers' Vocal Fatigue and Throat Illness<sup>2</sup>

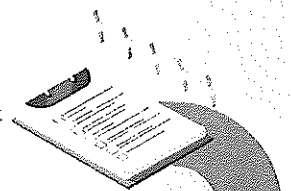
Schools that use instructional audio systems report 8% to 13% lower teacher absenteeism due to voice and throat problems.



6

### Improve Academic Test Scores<sup>3</sup>

Amplifying a teacher's voice can result in reading and language test score improvements for students at all elementary levels.



**Distractions in the classroom are inevitable, but technology can help keep your students' attention.**

Using an audio system can grant teachers more control with less effort, overcoming the hurdle of constantly raising his or her voice to capture a classroom's attention. Lightspeed has the technology to help teachers engage more effectively and efficiently with students. Visit <http://www.lightspeedtek.com/products> for more information.

#### Sources:

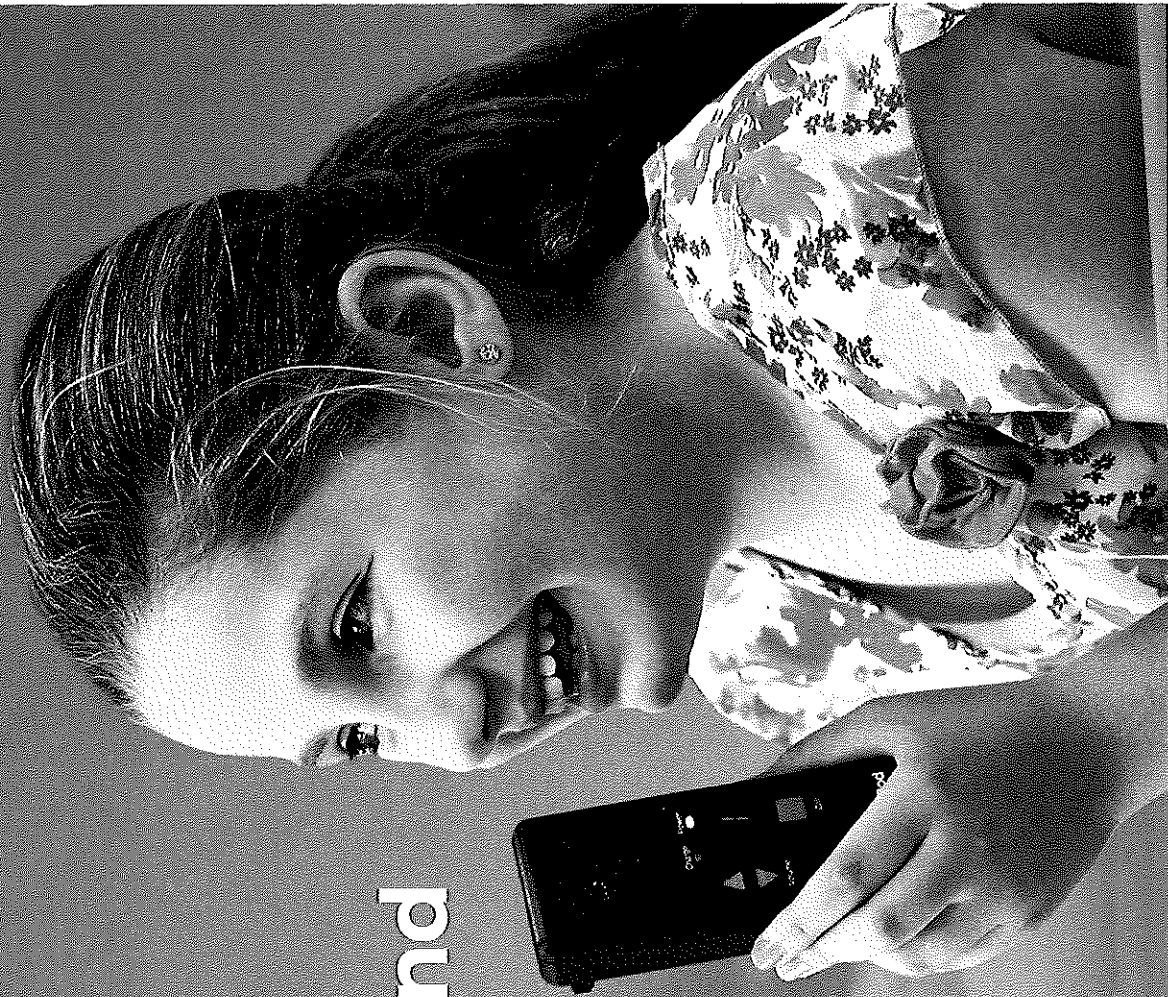
1. Zick, C. (2010). The Effect of Classroom Noise on Student Performance. *Journal of Educational Research*, 113(3), 185-190.
2. Zick, C. (2010). The Effect of Classroom Noise on Student Performance. *Journal of Educational Research*, 113(3), 185-190.
3. Zick, C. (2010). The Effect of Classroom Noise on Student Performance. *Journal of Educational Research*, 113(3), 185-190.

NG570050-2



# Improving student learning through clear, intelligible sound

A RESEARCH OVERVIEW ON THE IMPACT  
OF INSTRUCTIONAL AUDIO SYSTEMS



# Contents

## Barriers to Hearing in the Classroom

- Environmental Barriers to Intelligible Sound
- Distance Makes Hearing Clearly More Difficult
- Student Hearing Loss is Prevalent
- New Challenges in COVID-19 Era

## Instructional Audio Facilitates Student Learning

- Measurable Benefits for Every Student
- Students with Learning Differences: Improved Attention, Reduced Discipline Problems
- English Learners Experience Increased Speech Perception, Interaction
- Amplification Supports Literacy Gains
- Measurable Gains for Academic Achievement

## Amplified Classrooms Support Educators

- Reducing Vocal Strain, and Voice-Related Absences
- Improved Classroom Management, Student Engagement

## Instructional Audio Systems Represent A Proven Learning Solution for Today's Classroom

## Instructional Audio System Case Study: Edmonds School District

## Summary

Classroom sound amplification or instructional audio systems – also called classroom audio distribution systems – are an important tool for today’s learning environment, providing ample, measurable benefits for learners and educators.

Studies over the past four decades have underscored the crucial link between being able to hear clearly and learning. These studies have identified consistent and evidenced-based benefits of the use of instructional audio systems to distribute sound equally throughout a learning environment.

Researchers have identified important benefits to all learners, including increased speech intelligibility, increased academic achievement and listening abilities. The benefits have been particularly important for English language learners and those navigating learning differences, underscoring important equity and accessibility issues in unamplified classrooms.

Educators also benefit from instructional audio systems, which help protect vocal health, improve classroom management and instructional efficiency and effectiveness as they are spared the time spent repeating information.

As schools have recalibrated to facilitate learning while minimizing risks of COVID-19, health measures such as social distancing, masks, plastic barriers and increased ventilation pose new barriers to hearing information clearly.

*Instructional audio offers a powerful tool, supporting learning in the classroom and overcoming many barriers students and educators face.*



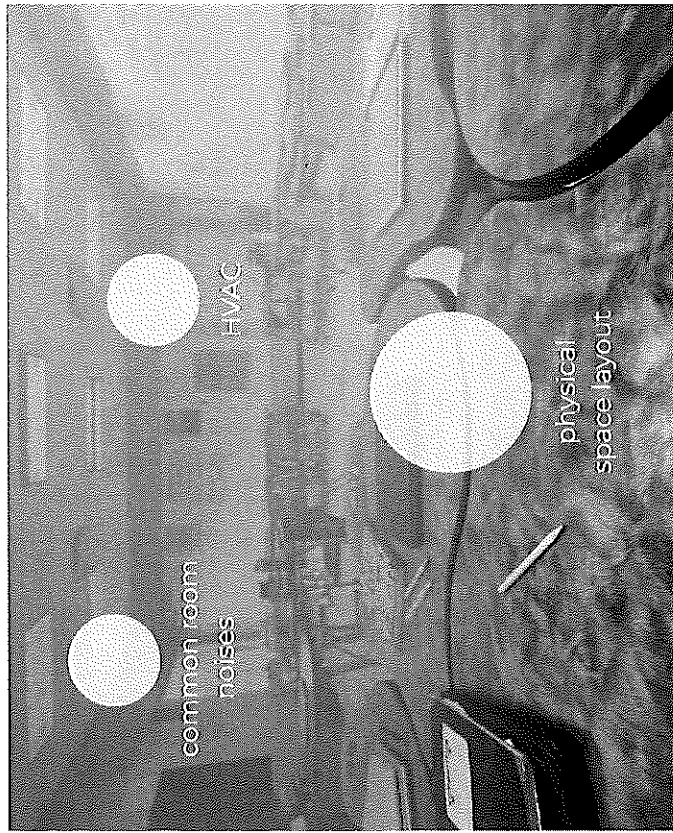
# Barriers to Hearing in the Classroom

## CUSTOMER INSIGHT:

“We realized it was a great inequity. Some students were getting a better education simply because they could hear their teacher more clearly.”

**Rebecca Cooksey**

Assistant Superintendent of Innovation and Technology Services,  
Lancaster School District, Lancaster California



# Environmental Barriers to Intelligible Sound

Students spend an estimated 75% of their day listening, yet the classroom environments are often very noisy, creating barriers to that learning by interfering with speech perception and draining cognitive energy that could otherwise be applied to learning. As the level of noise in a room increases, children may lose the ability to multitask or perform effortful learning activities.<sup>1</sup>

**Simply put: When an environment is noisy, more energy is spent on hearing, rather than understanding.**

Nearly all – 97% of classrooms – fail to meet the acoustical standard for a good learning environment.<sup>2</sup>

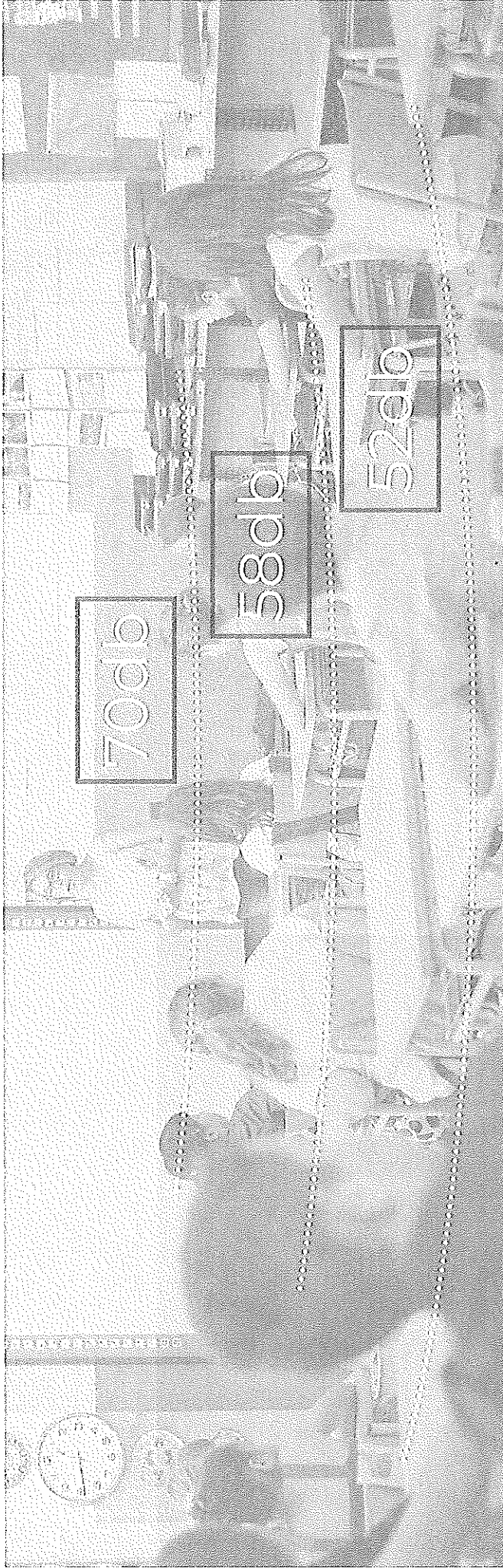
There are many sources of noise in classrooms. The physical space itself – with multiple hard surfaces – often cause “reverberation,” which makes speech difficult to understand by smearing sounds together.

Sound from others in the room – tapping feet, shifting desks or chairs, throat clearing – also contribute to a noisy environment.

**Students spend 75% of their day listening, but 97% of classrooms fail to meet acoustical standards for a good learning environment.**

Heating and ventilation systems or electronic equipment in use and noise from outside the classroom, whether people passing in the hallway or traffic, construction or airplanes outside also impede a student’s ability to hear clearly.

<sup>1</sup>For details on Florida’s Superintendent’s Report on Quality of Schools, see: <http://www.floridapublicschools.org/Reports/2013-14/Florida%20Public%20Schools%20Quality%20Report%202013-14.pdf>



## Distance Makes Hearing Clearly More Difficult

Classrooms designed to minimize noise still face the problem of distance. Without an instructional audio system, students in the front row may hear clearly, but the sound quality degrades significantly for those seated further away.

Studies have demonstrated that children need to be within 6 feet of the teacher for maximum intelligibility, something that isn't realistic given class sizes and the fact that teachers often move around the room while instructing.<sup>3, 4</sup>

Even seated 6 feet away, students show a 17% loss in critical speech recognition.<sup>5</sup> Students seated in the back of a classroom may miss up to 30% of what their teacher says.<sup>6</sup>

The problem is even worse for English language learners (ELLs), who score significantly worse on speech perception than native English speakers. For example, an ELL student seated 6 feet from the teacher achieved 93% speech perception correctly, a figure that dropped to 62% for those seated 18 feet away.

Students seated in the back of the classroom may miss **up to 30%** of what their teacher says.

<sup>3</sup> Files, H. (2003). The Sounds of a Sound Education. School Planning and Management.

<sup>4</sup> Palmer, C.V. (1997). Hearing and Listening in a Typical Classroom. American Speech-Language-Hearing Association, Rockville, MD.

<sup>5</sup> Levitt, R., & Flexer, C. (1991). Speech Degradations Measured by the Rapid Speech Transmission Index (RSTI).

<sup>6</sup> Ear & Hearing, 12, 115-118

Classroom Amplification Resource Room Study (HARPS) (2005b2006c)

# Student Hearing Loss is Prevalent

For young learners, intelligible sound is even more crucial because they don't have the benefit of life experience to fill in the gaps for any phonetic sounds or words they miss.

On average, 30% of elementary (K-6) students fail a 15dB test, mostly due to ear infections.<sup>7</sup> A smaller percentage have chronic mild hearing loss (MHL), a larger percentage is affected periodically throughout the year.

The cost of MHL is significant. Researchers found that 75% of these students have academic deficiencies by sixth grade. Additionally, many students with unidentified MHL are misdiagnosed with learning disabilities.<sup>8</sup>

Hearing loss is increasingly an issue for older students as well. According to the American Osteopathic Association, 1 in 5 teens will experience some form of hearing loss—a rate about 30% higher than it was 20 years ago.<sup>9</sup>



**75% of students**  
with mild hearing loss have academic  
deficiencies by sixth grade.

<sup>7</sup> W-492  
W-493

<sup>8</sup> <http://www.aao.org/press-releases/2012/03/2012-03-01>

## New Challenges in COVID-19 Era

After abruptly closing in response to the novel coronavirus pandemic during Spring 2020, schools were forced to recalibrate how education was delivered.

As school buildings re-open, health measures to reduce the transmission of the novel coronavirus, including use of masks, social distancing, ventilation measures, plexiglass, and hybrid approaches that blend in-person and remote learners introduce new barriers to clear, audible sound in the classroom.<sup>10</sup>

Recent research demonstrates use of face coverings muffles or reduces speech clarity of speech.

But what may be frustrating in simple interactions at a grocery store or other service provider has serious consequences for young learners, for whom access to clear speech, including soft high frequency consonants – such as “P,” “SH,” “F” and “S” – is critical for early language and literacy development and overall academic achievement.<sup>11</sup>

Researchers at the University of Illinois found the same frequency range most important for speech intelligibility is the one face masks affect the most.<sup>12</sup>

Taking into account the additional challenges presented by masks and social distancing, the Educational Auditory Association recommends instructional audio systems for all students.<sup>13</sup>

## CUSTOMER INSIGHT

“We can talk to the Zoomers and the roomers at the same time. Whether they’re special ed or gen ed, we can chime in and everyone hears us equitably.”

**Jaimee Rothenberg**  
Fourth-grade special education teacher,  
Salt Creek Elementary School  
New Providence, New Jersey



<sup>10</sup>Bohannon, R.W., and Davis, B.L., and Wang, C. (2020, July). The effects of salient face coverings with different audio frequencies on the oral communication of children: The impact of pediatric, pediatric, adolescent, and religious audio frequency, pitch, and volume on the efficacy and acceptability of pediatric and adolescent communication.

<sup>11</sup>https://www.researchgate.net/publication/370777736

<sup>12</sup>https://www.researchgate.net/publication/370777736

<sup>13</sup>https://www.researchgate.net/publication/370777736

# Instructional Audio Facilitates Student Learning

## Measurable Benefits for Every Student

The positive impact of instructional audio systems on learning is broad and well-established.

In addition to speech perception improvement, instructional audio systems have been shown to improve learning and social behaviors, including increased communication with peers and teachers.

Recent studies have identified associations between use of instructional audio systems and educational achievement, including literacy, reading fluency, listening comprehension and reading vocabulary.

***95% of students said it was easier to hear their teacher and helped them listen better with classroom amplification.***

Benefits of instructional audio systems have been demonstrated among English language learners (ELLs), children with attention deficit hyperactivity disorder (ADHD) and children in special education classes.

Studies have shown benefits of instructional audio all students, but young learners have the greatest need. The brain's auditory

network isn't fully developed until age 15, so children need a quieter environment and louder auditory signal in order to learn.

The Mainstream Amplification Resource Room Study – the largest study conducted and certified by the U.S. Department of Education – concludes that students who can benefit from instructional audio systems include:

- Students with hearing loss
- Children younger than age 15
- Students sitting in the back of the class
- Students struggling academically
- Students in a noisy classroom environment
- Students in a team-teaching environment
- Students with a soft-spoken teacher
- Students with learning differences
- ELLs

Another seminal body of research – Improving Classroom Acoustics (ICA) Studies – found 95% of students said instructional audio made it easier to hear their teacher and helped them listen better.<sup>14</sup>

## CUSTOMER INSIGHT

“With Lightspeed, all of our students can hear the lesson. The lesson comes to life, they are able to respond, and the teacher is able to connect with all of the students seamlessly.”

**Sharmayne Rutledge, PhD**

Executive Director for Leadership,  
East Baton Rouge Parish School System,  
Baton Rouge, Louisiana



# Students with Learning Differences: Improved Attention, Reduced Discipline Problems

For students with auditory processing disorders or other learning differences, classroom amplification can have profound impact.

The MARRS study found the number of students referred to special education in K-6 decreased by 43% in amplified classes with and without hearing impairment.

Audio clarity is particularly important for students with auditory processing and attention issues often referred for special education.

Instructional audio systems help students pay more attention. One study of first and second graders showed student distractibility and requests to repeat something decreased and on-task behavior increased 17%.<sup>15</sup>

Other studies on the impact of regular use of instructional audio point to improvements on the Screening Instrument for Targeting Educational Risk (SIFTER) and suggest that use of the systems may lead to better identification of children at risk for academic difficulty.<sup>16</sup>

The number of students referred to special education in K-6 **decreased by 43%**

in amplified classes with and without hearing impairment.

## CUSTOMER INSIGHTS

“When kids have access to the full range of sounds in the classroom ... it comes in loud and clear for them. Having that teacher voice, no matter where you are in the classroom, it really captures the students’ attention.”

**Jennifer Goldman**

Principal, Mountain View Elementary School,  
Simi Valley, California



<sup>15</sup> Allen, L. & Frazee, D. (1990). Effects of sound field amplification on students with task-oriented language disorders. *The American Speech-Language Hearing Association, San Diego, CA.*

<sup>16</sup> Smaldino, J. (1997). *Handbook of Auditory Impairability*, 5-69.

# English Learners Experience Increased Speech Perception, Interaction

The positive impact of amplification has been especially clear for English language learner (ELL) students.

When listening in a noisy environment, ELL students had an average decrease in performance accuracy that was four times greater than monolingual children.<sup>17</sup> Add instructional audio systems and the impact is stark: Speech perception scores improved up to 30% for ELLs.<sup>18</sup>

*In amplified classrooms, ELL students seated 12 feet from the teacher were able to correctly recognize 79% of monosyllabic words, compared to only 58% in unamplified classrooms, a disparity that worsened for students seated farther away.*

Instructional audio systems also encourage student interaction, helping ELL students move beyond the “silent phase” and become more comfortable speaking in the classroom.

Speech perception scores improved up to 30% with instructional audio systems.

<sup>17</sup>Wesley E. Kohn, G. K. Sparrow, & David D. Blanton. (2005). Cross-lingual and individual learning trajectories assessed through the comprehension of language-specific and non-specific words in a classroom. *Journal of Experimental Psychology: Applied*, 11(2), 115-127.

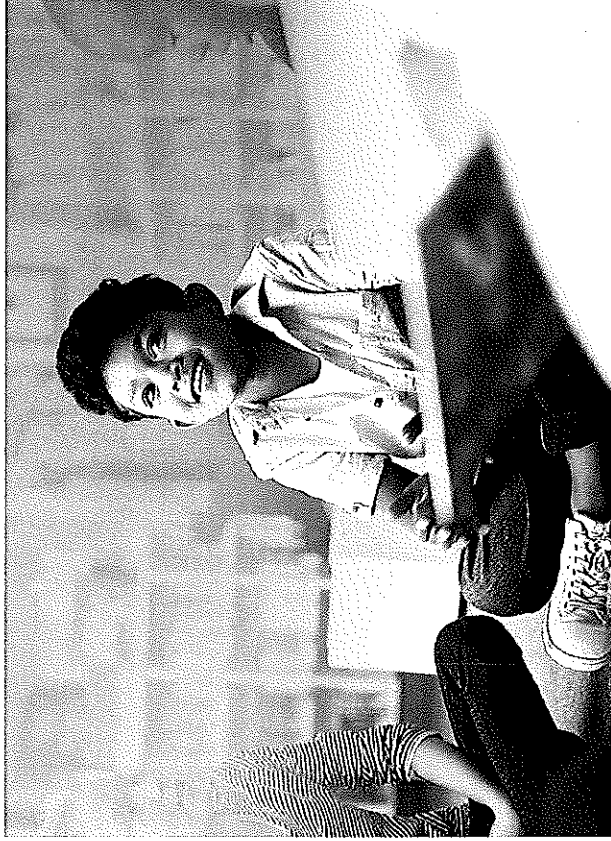
<sup>18</sup>Wesley E. Kohn, G. K. Sparrow, & David D. Blanton. (2005). Cross-lingual and individual learning trajectories assessed through the comprehension of language-specific and non-specific words in a classroom. *Journal of Experimental Psychology: Applied*, 11(2), 115-127.

## CUSTOMER INSIGHTS

“The Beaverton School District is committed to equitable outcomes for ALL students, including our ELLs. Investing in our ELLs is a moral imperative and it is something we will continue to do until we improve academic outcomes for these students.”

**Toshiko Maurizio, Ed.D.**

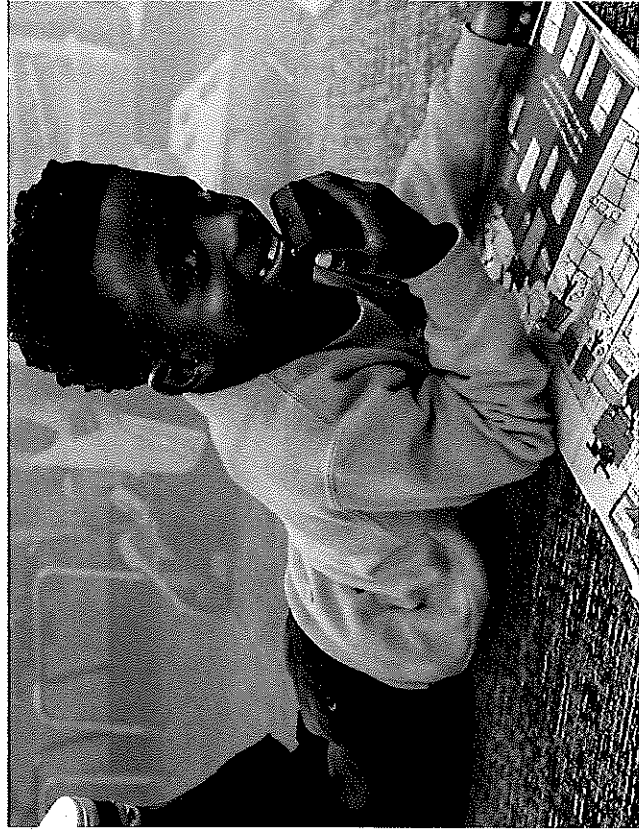
Administrator for Multilingual Programs,  
Beaverton School District, Beaverton, Oregon



“Children write as they speak and they speak as they hear, so when students don’t hear clearly, their speech and writing is affected.”

**Meg Visconti**

District Speech Pathologist  
Flowing Wells Unified School District  
Tucson, Arizona



## Amplification Supports Literacy Gains

Instructional audio systems can have a big impact on early literacy skills, including speech recognition and listening abilities. A study of standardized tests in Oregon classrooms showed stark differences in amplified classrooms:<sup>19</sup>

- First graders scored an average of 35% higher on the Dynamic Indicators of Early Literacy (DIBELS) skills and 21% higher on the Development Reading Assessment (DRA).
- Third graders scored an average of 21% higher on Oregon’s Technology Enhanced Student Achievement test and 32% in words per minute in reading fluency.
- Fourth and fifth grade students’ words per minute averaged 35% higher on a reading fluency test.

In a study<sup>20</sup> that measured the impact of instructional audio systems on students’ phonological and phonemic awareness, 78% of students who received phonological and phonemic instruction in an amplified classroom scored above the mean on the Yopp-Singer Test of Phonological and Phonemic Awareness, compared with 57% of students who learned in unamplified settings.

***First graders scored an average of 35% higher on the Dynamic Indicators of Early Literacy assessments in amplified classrooms.***

Only 9% of the children taught in amplified classrooms had scores that indicating risk for reading problems, compared with 44% among those who received the instruction in an unamplified classroom and 57% of students who did not receive any instruction.

<sup>19</sup>Wells, L. (2019). *Amplification Systems in Oregon Schools: Characteristics and Impacts*.  
<sup>20</sup>Wells, L. (2019). *Amplification Systems in Oregon Schools: Characteristics and Impacts*.  
Flowing Wells Unified School District, 2019. <https://www.fwsd.org/Assets/2019-2020/Amplification%20Systems%20in%20Oregon%20Schools.pdf>

# Measurable Gains for Academic Achievement

Instructional audio systems have been consistently shown to have a positive impact on academic achievement. Studies show statistically significant improvements in reading and language test scores for K-6 students, both with normal hearing and those with mild hearing loss.<sup>21</sup>

The academic benefits were attained quickly and maintained. Researchers have highlighted significant gains in academic scores that were clearly evident in less than one school year and were maintained for study periods of up to three years.

Among urban, at-risk fourth and fifth grade students in Utah, instructional audio systems successfully reversed a two-year downward trend in achievement test scores. Scores of students in amplified classrooms were 10-15% higher than those in unamplified settings on the Stanford

Achievement Test – including reading, language, math, science, and social studies, and the state’s criterion-referenced reading, math and science tests. Among English language learners, the average gain on the criterion-referenced test was 16%.<sup>22</sup>

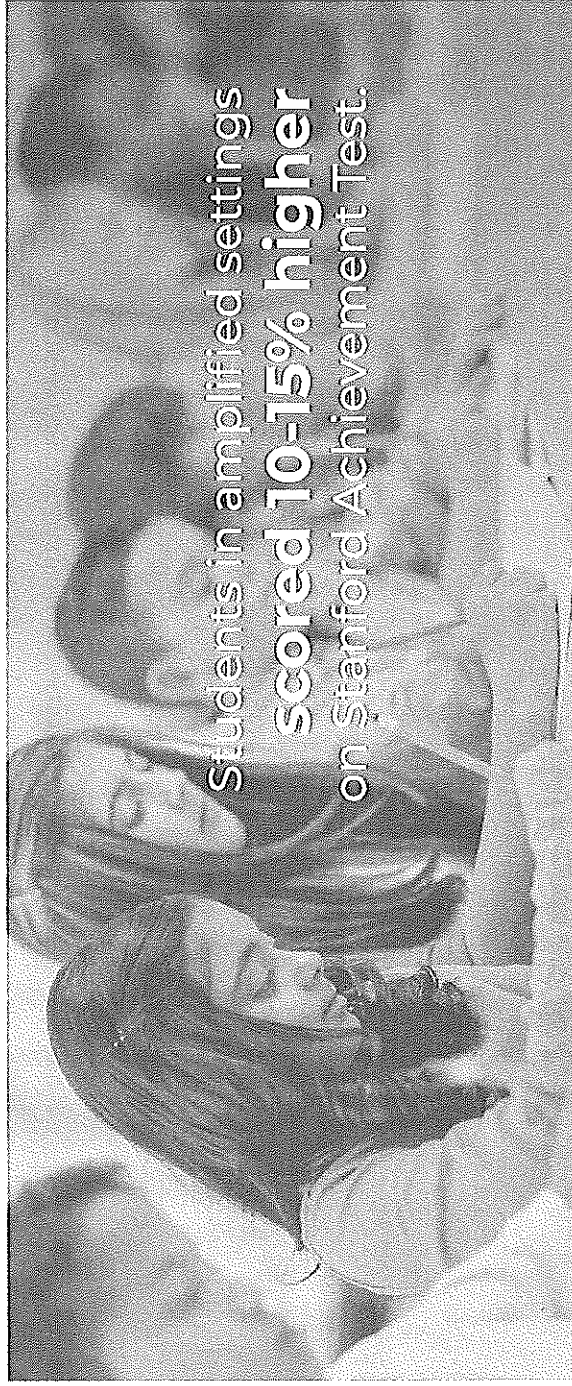
A study by of three first grade Utah classrooms showed 74% of students scored at the basic level or above on the Utah State Core Reading Text after installation of amplification systems, up from 44-48% during the five years prior.

## CUSTOMER INSIGHT:

“Lightspeed audio tools are becoming an essential component of providing students with the support they need to meet their learning objectives. The systems are helping both teachers and students achieve success.”

**David Haglund, Ed.D**

Former Deputy Superintendent  
Santa Ana Unified School District, Santa Ana California



Students in amplified settings scored 10-15% higher on Stanford Achievement Test.



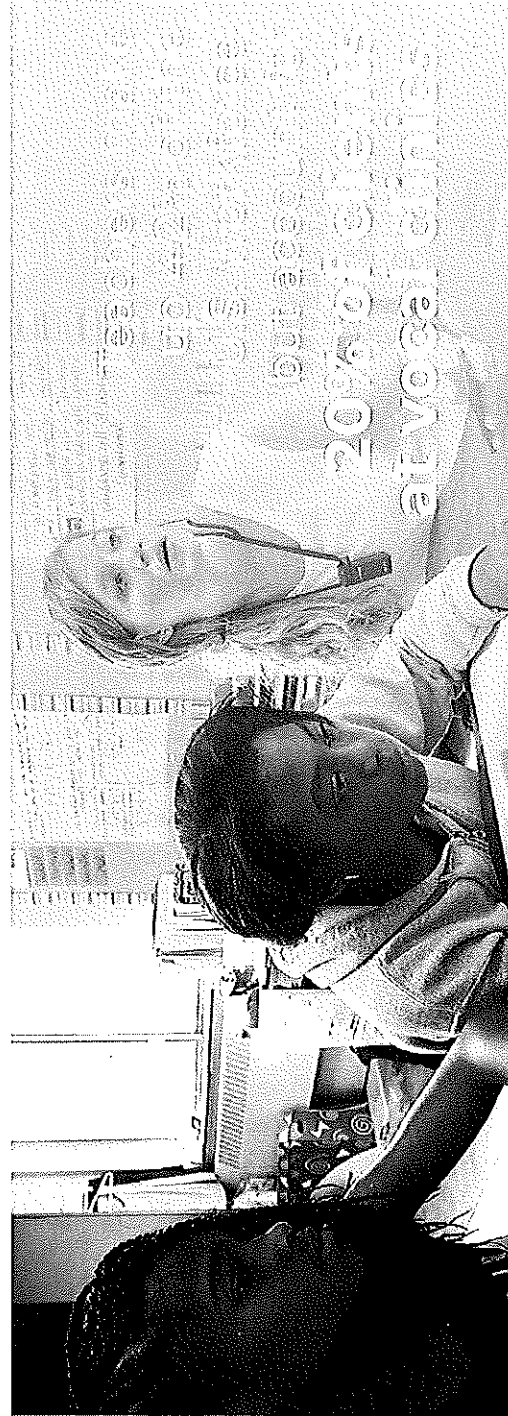
# Amplified Classrooms Support Educators

## CUSTOMER INSIGHT

“We speak for hours and hours a day and we can really strain our vocal cords. This mic really allows me to not have a sore throat as much as I used to because I don’t have to speak at a higher level.”

**Natasha Allen**

Fourth-grade Teacher, Salt Creek Elementary School  
New Providence, New Jersey



## Reducing Vocal Strain, and Voice-Related Absences

Instructional audio systems don't just benefit learners. They also provide important benefits for teachers.

Teachers using instructional audio systems report ease of speaking and greater vocal endurance as well as decreased fatigue, as well as greater voice clarity.<sup>23</sup>

Educators typically spend more than 80% of their day talking, which can be draining to make sure students in all parts of the classroom can hear.

Projecting your voice levies a physical toll: While teachers make up 4.2% of the U.S. workforce, they account for up to 20% of clients at vocal clinics.<sup>24</sup>

That physical toll also drives absenteeism, as teachers grapple with hoarseness, pain, fatigue while speaking and temporary loss of voice.

Researchers found absences due to vocal strain and voice fatigue decreased from 15% a year to 2-3% a year in amplified classrooms.<sup>25</sup>

In another study, absences among teachers in amplified classrooms in Iowa fell by 36%.<sup>26</sup> Another study in Florida's Orange County Public School District found a 25% decrease in teacher absenteeism in amplified classrooms.<sup>27</sup>

© 2014 JBL Education. All rights reserved. JBL Education, Inc.

<sup>23</sup> K. S. Allen, "The Effect of Classroom Amplification on Teacher and Student Performance," *Journal of Research in Science Teaching*, vol. 42, no. 1, pp. 1-15, 2004.

<sup>24</sup> Ibid.

<sup>25</sup> J. L. Allen, "The Effect of Classroom Amplification on Teacher and Student Performance," *Journal of Research in Science Teaching*, vol. 42, no. 1, pp. 1-15, 2004.

<sup>26</sup> Ibid.

<sup>27</sup> Ibid.

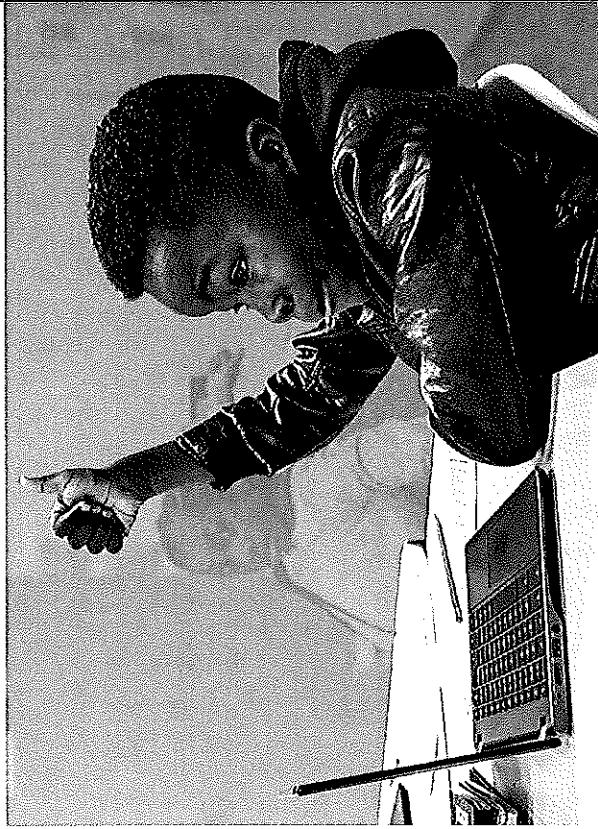


## CUSTOMER INSIGHT

“Students in classrooms with Lightspeed audio systems pay attention, have better behavior, and are more engaged. Audio systems help create a more effective experience, not only for the students, but for the teachers too.”

**Howard Vogel**

K-12 Mathematics Supervisor  
Pennridge School District  
Perkasie, Pennsylvania



# Instructional Audio Systems Represent Proven Learning Solution for Today's Classroom

The need for audible and intelligible sound in the learning environment has never been greater.

Research clearly demonstrates instructional audio systems help students learn, facilitate teacher effectiveness and increase student engagement. These systems help create a more equitable and inclusive environment for all students, but especially for English language learners, those experiencing hearing deficits or navigating other learning differences.

Instructional audio systems go beyond overcoming barriers to learning. They also present schools and educators with an important opportunity to increase student engagement, support academic achievement and build early literacy.

Amplified classrooms support teachers, easing vocal strain, driving absenteeism, facilitating classroom management and effectiveness.

Countless new education technologies are introduced each year, but few have the proven track record of evidence-based results as instructional audio systems.

**Go to [lightspeed-tek.com](http://lightspeed-tek.com) to learn how instructional audio can support learning in your school.**

# Instructional Audio System Case Study: Edmonds School District

Results from a six-month study on the effectiveness of Lightspeed's instructional audio system convinced Edmonds School District in suburban Seattle, Washington, to make the product part of its basic classroom technology package going forward.

The trial involving 28 teachers across two K-6 schools serving a high percentage of English language learners and low-income students found using instructional audio:

## Improved student engagement



Oral understanding of assignments by students improved by nearly 24%



Teachers improved their ability to capture student attention by 33%



Student engagement and classroom participation improved by 15%

## Increased sound clarity and intelligibility



More than 90% of students felt it helped them listen better nearly all the time or much of the time



58% of students felt they could hear their teacher clearly nearly all the time, compared to only 24% pre-installation



Students reported a 36% improvement in hearing and understanding of their peers nearly all the time or much of the time

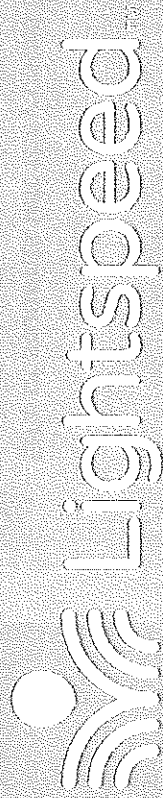
## Improved teacher health



Fatigue decreased 28%



Vocal strain decreased 38%



800.732.8999 | [WWW.LIGHTSPEED-TEK.COM](http://WWW.LIGHTSPEED-TEK.COM)

# The Benefits of Classroom Audio Technology

White Paper by Bruce Bebb, Marketing  
Communications Director, Lightspeed Technologies

Classroom Audio Technology has been used effectively to enhance listening and learning environments for more than 20 years. The primary goal of CAT is to provide a high level of speech intelligibility and to evenly distribute sound throughout the classroom. Research, validated by the U.S. Department of Education, is clear, consistent and conclusive...all students benefit from classroom audio technology.

“Hearing is the primary channel for learning. The more children hear, the better they learn.”

—Dr. Mark Ross,  
University of Connecticut

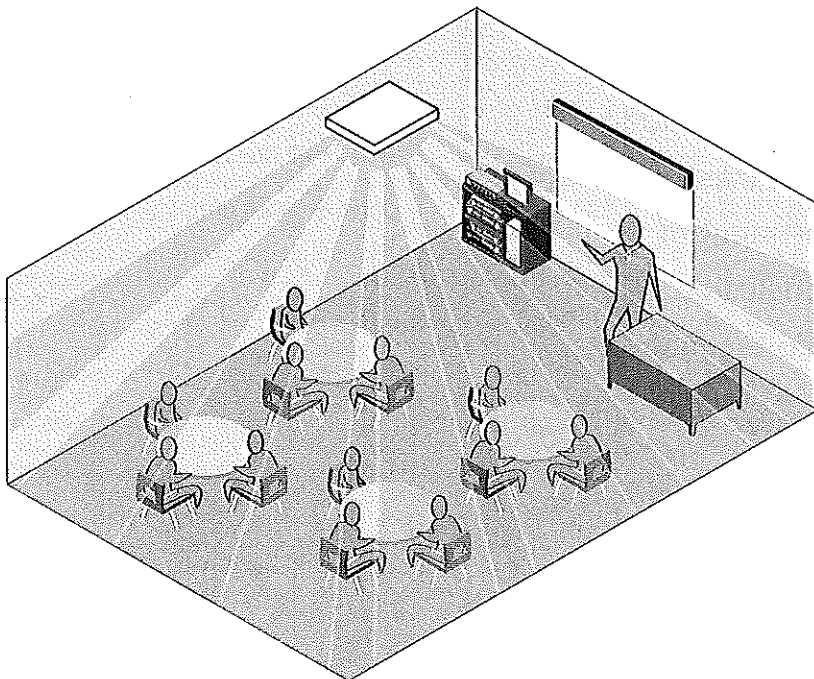
## Introduction

Recent studies have verified that hundreds of thousands of children are academically at risk due to a high incidence of poor classroom acoustics, high ambient noise levels in the classrooms, and mild hearing loss among pre-adolescents (K-6) due to common ear infections. These studies show conclusively that conditions in the majority of current kindergarten through 6th grade classrooms make it difficult for a significant portion of students to hear adequately. These same studies show that many of the children that are not hearing adequately become academically deficient in at least one subject by the 6th grade. The results from the largest study conducted, Mainstream Amplification Resource Room Study or the MARRS Project (1979–1993), have been validated by the U.S. Department of Education.

All the recent studies validate classroom audio as a proven tool that can overcome adverse classroom conditions, providing students with enhanced speech recognition and, therefore, much improved opportunity to learn. Sound-field classroom audio is now recognized as one of the most powerful and cost-effective tools for student improvement.

## What Is a Classroom Audio System & How Does It Work?

Classroom audio systems may be installed or portable. They contain similar system components and operate in much the same manner. The teacher wears a lightweight wireless microphone that transmits the signal to a receiver/amplifier unit. The voice is then amplified through loudspeakers and distributed evenly throughout the classroom. The amplified teacher's voice overcomes background noise, poor room acoustics and mild hearing loss to make it easier for students to concentrate on what the teacher is saying.<sup>(1)</sup>



“Sound systems help level the playing field, allowing every child the opportunity to clearly hear the spoken instruction”

—Dr. Carol Flexer,  
Audiologist,  
University of Akron

Classroom audio has emerged as the perfect technology for delivering clear instruction to all students, mitigating poor acoustics and high ambient noise levels.

## The Goal of Classroom Audio Technology

Young children spend 75% of their school day involved in listening activities. Their primary channel for learning is hearing.<sup>(2)</sup> The better children can hear, the more they can learn.<sup>(3)</sup> For maximum learning to occur the teacher's voice must be highly intelligible to every child. Younger children's lack of experience and knowledge with speech and language makes them very dependent on the soft, subtle consonant sounds that make up the key elements of word recognition.

The goal of Classroom Audio Technology is to enable every child in a classroom to clearly hear all the speech components of the teacher's voice no matter where a child is seated relative to the teacher's position in the room.

The following benefits of Classroom Audio Technology is a synopsis of related research projects. Detailed summaries are available upon request.

### High Ambient Noise Levels Are Easily Overcome

The mix of various noises that make up the ambient noise in a classroom are composed of external noises like street traffic, construction, playground noises; general facilities noises like heating and air conditioning, hallway noises; and classroom noises like computers, printers, furniture movement, children talking, etc. Quantitative sound level measurements have revealed that occupied kindergarten classrooms can range from 65 to 75 decibels (dB), occupied elementary classrooms can range from 55 to 65 decibels, and occupied high school classrooms can range from 60 to 70 decibels. Since a teacher's voice level drops by 75% for a child 12 feet from the teacher, these levels of ambient noise significantly impair the listening ability of a child seated 12 feet or more from the teacher's position in the room. At these kinds of noise levels critical components of speech are masked and it is not uncommon to have less than 50% word recognition for a K-3 child seated 12 feet or more from the teacher.

Classroom Audio overcomes ambient noise levels and distributes the teacher's voice at the same amplified level throughout the classroom. Every child hears the teacher at the same level no matter where the child is seated.

### 30% of K-6 Children Hear Their Teacher Significantly Better

The U.S. Department of Education has validated in an extensive series of studies (conducted from 1971 to the present) that approximately 30% of any K-6 population will have ear infections and middle ear fluid throughout the school year. These common middle ear conditions produce a mild hearing loss (MHL) of 10 to 20 decibels. Without intervention, 70% of these MHL children will become academically deficient in at least one or more subjects by the 6th grade.<sup>(4)</sup>

The U.S. Department of Education has validated that classroom audio in the classroom can overcome the hearing loss of MHL children and with classroom audio these children are enabled to academically perform as well as children with normal hearing.

## Attention & On-Task Time Improve

One of the most common difficulties for children in listening is distraction. A student sees a movement in his peripheral vision, a child at the back of the classroom may hear a chair move next to her as loud as the teacher's voice. The result in either case may be the loss of a word or a concept. A child's sensitivity to distractions can vary day-to-day and even hour-to-hour. In addition, the average classroom today will have several children with some type of learning difficulty; one of the most significant is Attention-Deficit Disorder (ADD).

It is now known that classroom audio can in many cases reduce a child's sensitivity to distractions. When a teacher's voice is amplified 5 to 15 decibels above ambient noise, improving articulation and enhancing speech intelligibility, the amplified instruction can better capture a child's attention and tends to suppress their sensitivity to the normal sounds and movements within the classroom. Teachers using classroom audio report less repeating of instructions is necessary and fewer reminders are needed.<sup>(5)</sup>

## Class Interaction & Participation Increases

Children who cannot hear and understand clearly what they are being asked and told, often lack the confidence to participate in classroom discussion. The MARRS studies show clearly that a significant number of K-6 children cannot hear adequately due to poor classroom acoustics, high ambient noise levels, and high incidence of mild hearing loss. When a child cannot hear instructions well, the uncertainty of what is happening can cause reluctance to being involved.

Teachers employing classroom audio in the classroom note an improvement in student motivation and participation due to more consistent understanding of what is expected. They also report a marked improvement in responses to questions and requests. In classrooms where students used the microphone to amplify their voices, teachers report increased enthusiasm and desire to read and give oral reports.<sup>(6)</sup>

## Classroom Stress is Lowered & Fewer Behavior Problems

Educational psychologists have known for some time that as a teacher raises his/her voice level, the tension and anxiety among children in the class is heightened. The prime example is when a teacher needs to raise their voice in a forceful manner to get the attention of a child misbehaving in the back of a classroom. All the children feel the stress of such a verbal encounter. It is also well known that a loud, forceful command for some children can have the opposite response to the desired behavior. In general, children are known to respond best to a natural, conversational voice level.

Classroom Audio allows a teacher to speak in a natural conversational voice level and still be heard clearly. Teachers report a significant reduction in stress within the classroom, fewer behavior problems, better response to verbal correction when necessary and overall easier management/control of classrooms.<sup>(7)</sup>

## Classroom Audio

Technology has been defined as... "A speech intelligibility system that provides clarity of voice and even sound distribution throughout the learning environment."

—Lightspeed Technologies  
web site.

## Teacher Absenteeism Due to Voice Fatigue & Throat Illness Is Almost Eliminated

Voice fatigue and throat infections account for 11% to 16% of teacher absenteeism. Even in a classroom with relatively low ambient noise a teacher must project his or her voice to overcome the normal physics of sound travel through air. The inverse square law of physics defines that for every doubling of the distance from a teacher, their voice level drops by 75%. This means a student seated at 12 feet from the teacher hears the teacher's voice at less than one-eighth of the level of a child seated three feet away from the teacher. In order to overcome this loss of voice level over distance, many teachers have to project their voices well above a natural and healthy level for their vocal cords. This results in higher than average throat/voice problems for teachers.

With the use of classroom audio a teacher is able to speak in a conversational voice, all students hear them easily, and most, if not all, voice strain is eliminated. The outcome is that schools using classroom audio report significantly lower teacher absenteeism (8% to 13% lower) due to voice and throat problems.<sup>(8)</sup>

## Academic Test Scores Improve

The MARRS study clearly proved that classroom acoustics, ambient noise and mild hearing loss have a significant affect on the academic performance for 25% to 30% of K-6 populations. What has been overlooked until recently has been the impact of classroom acoustics and ambient noise on children with normal hearing.

Sound-field studies show that amplifying a teacher's voice results in exceptional improvement in reading and language test scores for all students at all elementary levels. It has reduced special education referral rates by up to 40% over five years. Some studies have shown a 7% to 10% improvement in academic test scores for normal hearing children. The statistically significant gains that have been made employing classroom audio have usually been evident in less than one full school year, and have been maintained in research study periods for up to three years.<sup>(9)</sup>

"In classrooms where students used the microphone to amplify their voices, teachers report increased enthusiasm and desire to read and give oral reports."

—Allen and Patton(6)

### Children for Whom English Is A Second Language Can Experience Over 30% Improvement In Word/Sentence Recognition

A 1994 study shows that noise in the classroom has a substantial negative impact on English Language Learners students when compared with native language students. At 18 feet from the teacher the ELL student scores 25% lower than native language children.

A recent study shows that ELL students can score as much as 30% higher on word/sentence recognition tests when classroom audio is in use. <sup>(10)</sup>

### Children With Other Learning Disorders Can Benefit

Several studies show that children with articulation disorders (5%–10% of all school age children), language disorders, auditory processing disorders, learning disorders, and unilateral sensorineural hearing loss all experience more severe speech recognition difficulties as the voice to noise level decreases (greater distances from teacher).<sup>(11)</sup>

Although there is not as much empirical data to support improvement due to sound-field classroom audio, improved voice to noise ratios have proven to help many of these children.

### Teacher Survey Shows Classroom Audio Systems Perceived More Useful Than Most Popular Audio/Visual Equipment

A survey of ninety school teachers ranked the importance of the most popular equipment used in class instruction. The equipment list included: cassette tape player/recorder, overhead projector, television, classroom audio system, camcorder, TV/VCR combo, and CD-ROM.

Those teachers who had used classroom audio gave it twice the #1 votes over the next most useful equipment.<sup>(12)</sup>

“For the first time in my  
career, I have energy at the  
end of the day”

—Ms. Miyahira

2nd grade teacher,  
Tigard, OR

## References:

1. (Mainstream Amplification Resource Room Study, 2005a) Mainstream Amplification Resource Room Study Project retrieved from: <http://www.marrs-study.info/marrs-study.html>
2. (Dahlquist, 1998) Dahlquist, L., Classroom Amplification: Not Just for the Hearing Impaired Anymore. Paper presented at the CSUN, March 1990, Los Angeles, Calif.
3. (Ross, M., 2005) Ross, M. Sound-field FM Amplification Theory & Practical Applications. 2nd Edition, 2004, Clifton Heights, NY. Thompson-Delmar Learning
4. (MARRS Project, 2005/b) Mainstream Amplification Resource Room Study 2005/b The Benefits of Classroom Amplification. Retrieved from <http://www.marrs-study.info/student-benefits.html>
5. (Allen & Patton 1990a) Allen, L. & Patton, D. (1990a) Effects of Sound Amplification on Students' On-Task Behavior. Paper presented at the American Speech-Language-Hearing Convention, Seattle, WA., Nov. 1990
6. (Allen & Patton 1990a) Allen, L. & Patton, D. (1990a) Effects of Sound Amplification on Students' On-Task Behavior. Paper presented at the American Speech-Language-Hearing Convention, Seattle, WA., Nov. 1990
7. (Berg, Bateman & Viehweg, 1989) Berg, F. Bateman, R. & Viehweg, (1989, Nov.) Sound-field FM Amplification in Junior High School Classrooms. Paper presented at the American Speech-Language-Hearing Association Convention, St. Louis, Mo., 1989
8. (Allen, L. 1996a) Allen, L., Dubuque, Iowa Public Schools Report, 1996.
9. (MARRS Project, 2005b) Mainstream Amplification Resource Room Study retrieved from <http://www.marrs-study.info/marrs-study.html>
10. (Crandell, 1994) Crandell, C., The Effects of Noise on the Speech Perception of Non-Native English Children. Submitted to Language, Speech and Hearing Services in the Schools. 1994.
11. (Crandell, 1993) Crandell, C., Speech Recognition in Noise by Children with Minimal Hearing Loss. *Ear & Hearing*, 14(3), 210-216. 1993
12. (Allen, L., 1996/b) Allen, L. Dubuque, Iowa, Public Schools. 1996/b



## Dedicated to Access for all

We create instructional audio and video solutions that unlock student access to learning opportunities and give teachers meaningful insights into moment-by-moment learning.

11509 SW HERMAN ROAD  
TUALATIN, OREGON 97062  
TOLL FREE: 800.732.8999  
PHONE: 503.684.5538  
FAX: 503.684.3197  
LIGHTSPEED-TEK.COM

36 Howard Drive·Ellisville, MS 39437  
P.O. Box 1590·Laurel, MS 39441

# HOWARD™

## TECHNOLOGY SOLUTIONS

888.912.3151 general·601.399.5077 fax  
888.323.3151 technical support

A Division of Howard Industries, Inc.  
www.Howard.com

### Online Quotation

**Quote No:** CH5 1348091.00      **Quote Date:** November 17, 2023  
**Customer Name:** Heather Henderlight      **Phone Number:** 8654255705  
**Company Name:** Oak Ridge Schools      **Fax Number:**  
**Quote Name:** Audio Enhancement BEAM System with Cart Mount

#### Item 1

Category	Description	Qty.	Unit Price	Ext. Price
System Type:	Accessories			
1:	XD Teacher Box with Teacher Pendant Microphone	21	\$223.00	\$4,683.00
2:	BEAM (XD Microphone, Mount, and Power Supply not included)	21	\$715.00	\$15,015.00
3:	CART MOUNT OPTION Cart Mount with Power Supply for BEAM	21	\$272.00	\$5,712.00
			<b>Sub-Total:</b>	\$25,410.00
			<b>Shipping &amp; Handling:</b>	\$705.00
			<b>Taxes:</b>	Tax Exempt
			<b>Total for Item 1:</b>	\$26,115.00

This Quote will expire on December 17, 2023.  
Please include your Quote Number on your Purchase Order.

#### Total for all pre-configured items

<b>Sub-Total:</b>	\$25,410.00
<b>Shipping &amp; Handling :</b>	\$705.00
<b>Taxes:</b>	Tax Exempt
<b>Total:</b>	\$26,115.00

#### Notes:

THIS QUOTATION IS EXPRESSLY LIMITED TO, AND EXPRESSLY MADE CONDITIONAL ON, PURCHASER'S ACCEPTANCE OF THE TERMS HEREIN AND ACCEPTANCE OF HOWARD'S GENERAL TERMS AND CONDITIONS OF SALE (LOCATED AT: <https://www.howardcomputers.com/info/termsofsale.cfm>), WHICH ARE FULLY ADOPTED AND INCORPORATED HEREIN BY REFERENCE. PURCHASER'S SUBMISSION OF A PURCHASE ORDER PURSUANT TO THIS QUOTATION CONSTITUTES PURCHASER'S ACCEPTANCE OF AND AGREEMENT WITH HOWARD'S GENERAL TERMS AND CONDITIONS OF SALE. HOWARD OBJECTS TO ANY DIFFERENT OR ADDITIONAL TERMS. A COPY OF THE ABOVE- REFERENCED GENERAL TERMS AND CONDITIONS OF SALE MAY ALSO BE OBTAINED BY CALLING 1-888-912-3151 OR EMAILING [webmaster@howardcomputers.com](mailto:webmaster@howardcomputers.com).

Howard's product warranties, return policies and related information are also available at <https://www.howardcomputers.com/support/warranties.cfm> and <https://www.howardcomputers.com/support/returnpolicy.cfm>, or may be obtained by calling 1-888-912-3151 or emailing [webmaster@howardcomputers.com](mailto:webmaster@howardcomputers.com).



Quote **57162**

**Detailed Bill of Materials**

**BoM 1**

Part#	Product Name	Qty	Unit Price	Total
	Category : Classroom Equipment			
	System : BEAM System - White			
ST-XD-9025	XD Teacher Box with Teacher Pendant Microphone	21	\$264.08	\$5,545.68
XD-1301	BEAM (XD Microphone, Mount, and Power Supply not Included)	21	\$736.39	\$15,464.19
AC-3076	Cart Mount with Power Supply for BEAM	21	\$351.26	\$7,376.46

# Pricing Proposal

Pricing Valid for 90 Days - February 20, 2024



## Oak Ridge Schools - BEAM Systems (Direct)

Classroom Equipment		\$28,386.33
<hr/>		
	Taxes	<del>-\$2,870.28</del>
	Shipping	\$1,052.56
<hr/>		
Oak Ridge Schools Price	29438.89	<del>\$32,309.17</del>
Cost Per Classroom		\$1,538.53

By sending in a Purchase Order in response to this proposal, the customer is agreeing to the Audio Enhancement terms and conditions which can be viewed at [Audioenhancement.com/terms](http://Audioenhancement.com/terms).

Audio Enhancement will invoice equipment at the time of shipment with payment due within terms. Services completed by Audio Enhancement will be invoiced upon substantial completion with payment due within terms.

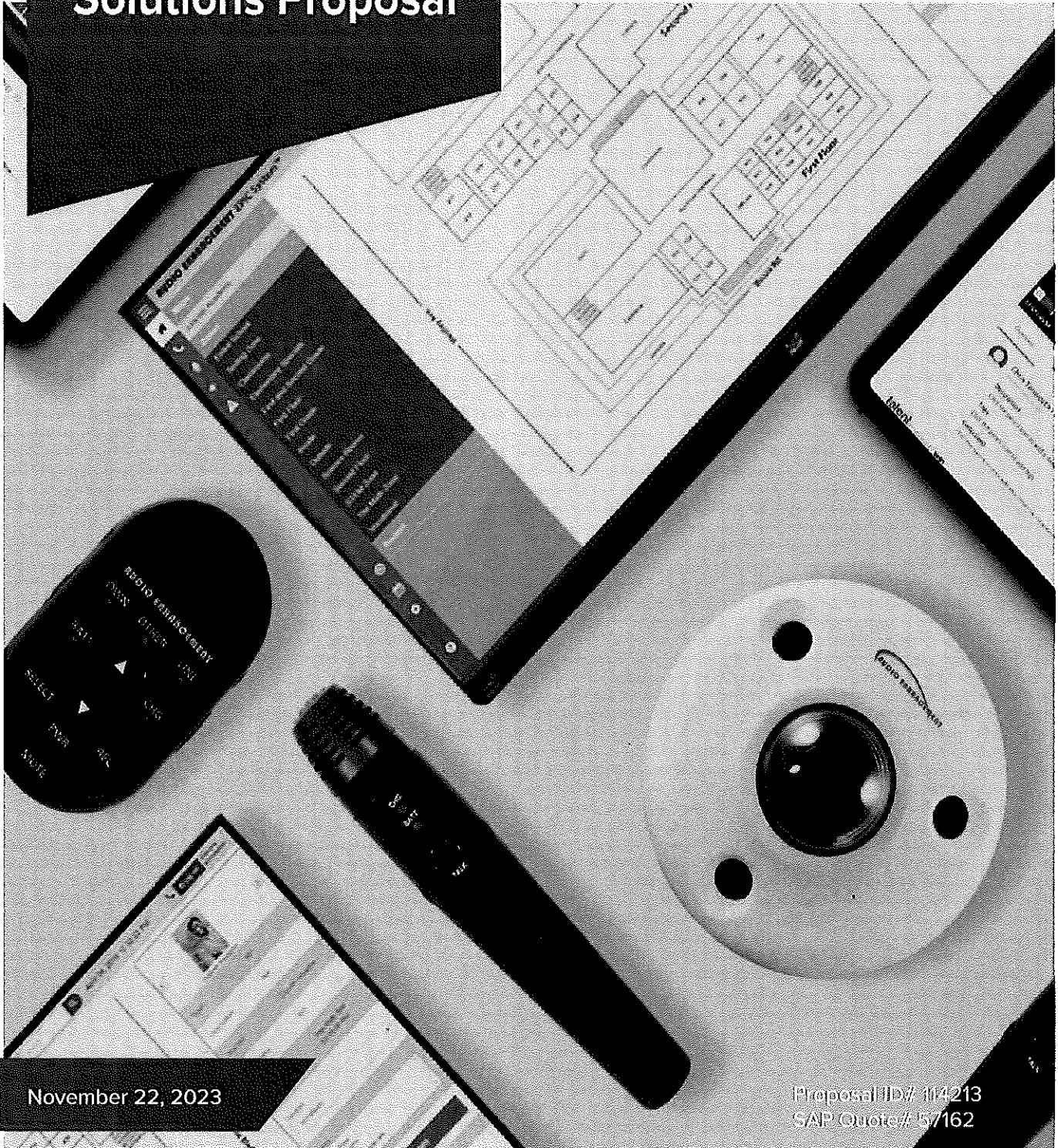
If there are any questions about this process, please reach out to our Receivables Team -- [receivables@audioenhancement.com](mailto:receivables@audioenhancement.com)

**\*\*\*Audio Enhancement will not be responsible for removal of existing equipment and cabling.\*\*\***

## Project Information

- **Project Summary \***  
Beam Systems
- **Request design team to design your school? \***  
No
- **Will this project be using a Contract? \***  
No
- **Will Audio Enhancement be installing? \***  
No
- **Site Status at Any Point During Implementation \***  
None of the above
- **Are there any drawings or specifications we are required to meet for this project? \***  
No

# Audio Enhancement Solutions Proposal



November 22, 2023

Proposal ID# 114213  
SAP Quote# 57162

Prepared For Oak Ridge Schools



Dear Oak Ridge Schools,

I want to personally thank you for inviting us to submit a proposal to Oak Ridge Schools!

When my mother, Claudia Anderson, founded Audio Enhancement over 40 years ago, we never imagined the impact our services would have on education today. Through customer feedback, we have grown from offering classroom audio solutions to providing district-wide communication and safety technology. We have impacted over 4,000 districts, 39,000 schools, and over 1,200,000 classrooms across the world. We are excited for the opportunity to help you!

Our team focuses on hiring employees with a passion to make a difference in education. We look forward to developing a deeper partnership with Oak Ridge Schools through building friendship and trust during the ongoing stages of your project.

It is our pleasure to submit this proposal to Oak Ridge Schools. As with all proposals, revisions can be made at any time.

We look forward to your response and are available to answer any questions during the review process.

From all of us here at Audio Enhancement, thank you!

Sincerely yours,



*Jeff Anderson*

Jeff Anderson  
Audio Enhancement, CEO

Notice of Confidentiality: The contents of this proposal are intended solely for the use of the addressee and their organization and contains confidential and/or privileged information and may not be disclosed to any other party without written authorization from Audio Enhancement Inc.



# *Making a Difference in Education*

For more than forty years, Audio Enhancement has served the schools throughout the United States, providing both classroom audio enhancement systems as well as integration services for classroom technology. Audio Enhancement is headquartered in Salt Lake City Utah and has facilities in Georgia and Florida.

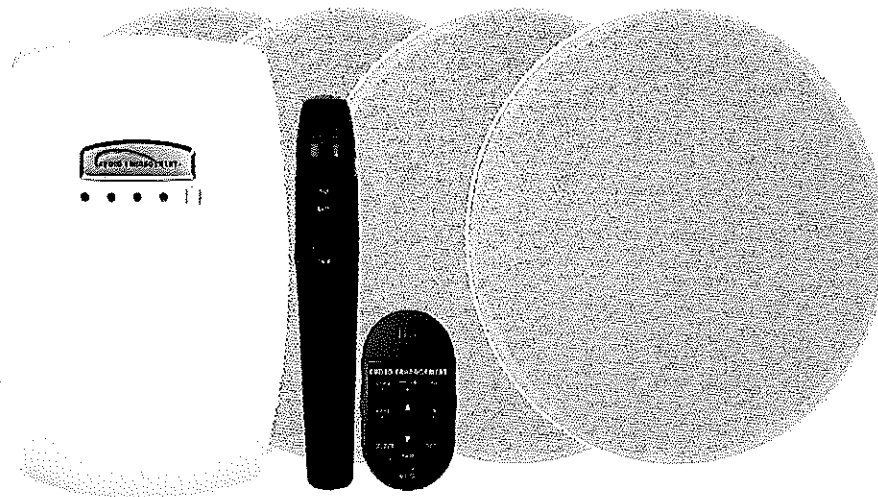
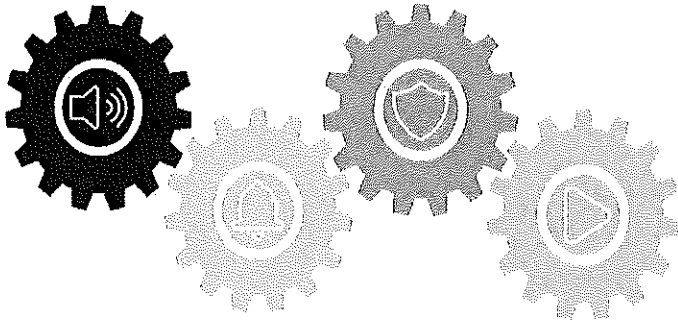
Audio Enhancement was founded In 1978 by Claudia Anderson around the simple idea that "learning begins with hearing." Having two hearing impaired children; the first Audio Enhancement systems were designed specifically for the hearing impaired. Early in our history, technological advancements made it possible to also provide whole classroom sound systems, benefiting all students. Audio Enhancement has been the innovator and leader in this field.

By 2004, it was clear that classroom audio enhancement systems were a key part of the overall technology landscape in the classroom. Based on our high level of support, outstanding customer service, and training that was provided for the audio systems, several school districts came to us and requested that we expand our product offerings. Based on these requests, we undertook an initiative to increase our capabilities in order to provide a complete integrated technology package for the classroom. These offerings include display devices, control, video/audio playback devices and interactive technologies. By utilizing the principles developed over thirty years of providing classroom audio systems to the schools, we were able to provide both technical integration, teacher in-servicing, training, and professional development to help the schools ensure the success of their technology goals.

Moving the company forward, In 2008, Audio Enhancement was incorporated: Jeff Anderson, President and CEO, Jennifer Crum, CFO, Jeremy Anderson, CAO and Justin Anderson, COO. Today, the Audio Enhancement product line improves student achievement, decreases teacher vocal fatigue and absenteeism, and creates positive student behavior. Audio Enhancement systems also increase focus and attention and supports classroom management.



The Anderson Family



## Classroom Audio

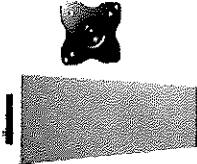
A classroom Audio Enhancement system provides teachers with benefits seen in documented sound field system research with the consistency and clarity of the newest classroom technology—XD Audio. Teachers wear an XD Microphone with confidence of zero signal drop-outs. This delivers their voices to each student as clearly as if the teacher were sitting right next to them. With Classroom Audio, you can expect more time on task, fewer behavior issues, less teacher verbal repetition, and better content understanding. These provide an increase in actual instructional time, one thing every teacher can use more of. Clear and equitably distributed audio in the classroom contributes to the overall quality of instruction, targeting gaps in learning.

## Selected Systems and Products

BEAM System - White

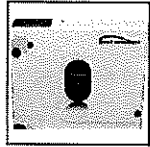
QTY - 21

COMPATIBILITY

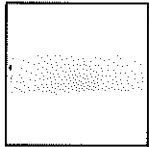


BEAM is a complete Classroom Audio Enhancement System. It includes a 3-channel XD wireless microphone receiver, multimedia inputs, line outputs for recording or assisted listening devices, and page mute.

### INCLUDED COMPONENTS



XD Teacher Box with Teacher Pendant Microphone



BEAM (XD Microphone, Mount, and Power Supply not Included)



Cart Mount with Power Supply for BEAM

### Full System Product Details

XD Teacher Box with Teacher Pendant Microphone, BEAM (XD Microphone, Mount, and Power Supply not Included), Cart Mount with Power Supply for BEAM,

**OAK RIDGE SCHOOLS**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

*Accommodations: Overnight lodging for students must be appropriately selected with student safety, quality of accommodations, cost, and location to events as central considerations. Students should be appropriately assigned to rooms and an overnight adult supervision and contact plan should be established and communicated to students.*

School: Oak Ridge High School Date: 2/29/24

*The following group requests permission to leave the school campus to participate in the educational activity indicated below. Parental permission will be obtained for each student.*

Class/Group Requesting Permission: ORHS Track

Educational Activity: Compete in a Large Invitational

Destination: Mountain Brook High School (Birmingham, AL)

Purpose of Trip: Compete in a large invitational

Departure Date: 4/12/24 Departure Time: 7:00am

Return Date: 4/13/24 Return Time: 1:00 am

Mode of Transportation: Charter Bus

First Student  Transportation Contractor  School System Van  Air Travel

NOTE: Only ORS employees are authorized to drive school system vans.

School System Van – Name of Driver: \_\_\_\_\_

Driver's License Verified by: \_\_\_\_\_ Attach copy of driver's license

Transportation Contractor: Rocky Top Tours Phone #: 865-410-4309

*(Only approved transportation companies may be used. Refer to ORS website for list of approved companies)*

Air Travel Flight #'s: \_\_\_\_\_

Hotel/Motel Name: Hampton Inn Birmingham/Mountain Brook

Address: 2731 US Hwy 280 S

City: Birmingham State: AL Zip: 35223

Phone: (205) 870-7822 Contact Person: Manager

Number of Nights: 1 Hotel Rating: 3.7 Stars

Name of School Sponsor/Date: Tom Sauer 2/29/24

Signature of School Sponsor: Thomas Sauer Digitally signed by Thomas Sauer  
Date: 2024.02.29 09:24:06 -05'00' Cell #: 843-345-6614

*Minimum requires teacher to student ratio:*

*PreK – 3 yr olds 1:4      K-2<sup>nd</sup> 1:6      3<sup>rd</sup>-4<sup>th</sup> 1:10      5<sup>th</sup>-8<sup>th</sup> 1:12      9<sup>th</sup>-12<sup>th</sup> 1:15*  
*4 yr olds 1:6*

# of Students: 44

# of Adults: 5

Chaperone/Student Ratio: 1-9

Professional Staff Chaperone(s)

- 1. Name: Tom Sauer Cell #: 843-345-6614
- 2. Name: Tom Froning Cell #: 865-806-2327
- 3. Name: Ed Wright Cell #: 865-686-2899
- 4. Name: Kate Zander Cell #: 423-231-2622

Other Chaperone(s):

- 1. Name: Logan Vincent Cell #: 423-782-7425
- 2. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 3. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

Field Trips which exceed \$25,000 or involve out of the country travel require School Board approval, regardless of fund raising, Booster Club participation or other contributions. Please follow these guidelines when requesting approval of such trip:

1. Submit an "Item for Action" for the Board Agenda (Principals have directions on submitting Board Agenda items).
2. Attach as documentation the following items"
  - Completed Campus Leave Request
  - Details of Trip/Itinerary
  - Justification/Explanation of Cost (per student/chaperone/total)
  - Financial Arrangements for students who cannot afford trip (if any)
  - Insurance Details
  - Out of country travel requires a release for each student participant

Financial Arrangements: (please indicate method)

No Cost   
  Paid by Students   
  Paid by School   
  Paid by School System

Substitute Required      Acct to be charged for Substitute \_\_\_\_\_

\$ 100 Per Student      TOTAL TRIP AMOUNT: \$ 7500.00

Provisions for those students unable to pay: \_\_\_\_\_  
 Boosters is undercutting the total coast of the trip and is only asking students to pay \$100. As always if there is a student in need we will meet with each individual for a plan whether it be a sponsor etc..

Other information, comments, and special arrangements: (foreseeable hazards must be identified)

\_\_\_\_\_

\_\_\_\_\_

Staff Member: Thomas Sauer Digitally signed by Thomas Sauer  
Date: 2024.02.29 09:24:46 -05'00'

Date: 2/29/24

Athletic Director: \_\_\_\_\_

Date: \_\_\_\_\_

**This Section for Athletic Trips Only**

At the high school level up to three events and/or tournaments per season can involve an overnight trip. However, no more than one day of school may be missed for these trips. (Under certain conditions, the Superintendent of Schools or designee may approve additional events.? These trips must be paid entirely from funds outside the Oak Ridge High School Athletic Department. TSSAA Tournament games would be an exception to this policy. (All overnight trips involving middle school athletics require Superintendent or designee approval.)

Number of overnight trips (including this request) requested during the current school year: \_\_\_\_\_

Athletic Director Signature: Joe Gaddis

Date: 2/29/24

Principal's Action:  Approved:  Disapproved:

Principal's Signature: Belinda

Date: 2-29-24

Superintendent or Designee's Action: Approved:  Disapproved:

Superintendent or Designee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Board Approval Date (if required): \_\_\_\_\_

**OAK RIDGE SCHOOLS**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

Accommodations: Overnight lodging for students must be appropriately selected with student safety, quality of accommodations, cost, and location to events as central considerations. Students should be appropriately assigned to rooms and an overnight adult supervision and contact plan should be established and communicated to students.

School: ORHS Date: 3/10/2024

*The following group requests permission to leave the school campus to participate in the educational activity indicated below. Parental permission will be obtained for each student.*

Class/Group Requesting Permission: Secret City Wildbobs - FRC Team 4265

Educational Activity: Compete at a robotics competition

Destination: George R. Brown Convention Center

Purpose of Trip: Attend the FIRST World Championship

Departure Date: 4/16/2024 Departure Time: approx. 5:30 am

Return Date: 4/23/2024 Return Time: 8:30 pm

Mode of Transportation: Parents & Mentors transport to airport; Plane to/from Houston, & Rental Vans in Houston

First Student  Transportation Contractor  School System Van  Air Travel

NOTE: Only ORS employees are authorized to drive school system vans.

School System Van – Name of Driver: Christopher Scott, Mark Buckner, Lisa Buckner, Janie Shanafield

Driver's License Verified by: Beth G... [Signature] Attach copy of driver's license

Transportation Contractor: \_\_\_\_\_ Phone #: \_\_\_\_\_  
*(Only approved transportation companies may be used. Refer to ORS website for list of approved companies)*

Air Travel Flight #'s: \_\_\_\_\_

Hotel/Motel Name: Still looking for hotels

Address: \_\_\_\_\_

City: Houston State: TX Zip: 77051

Phone: \_\_\_\_\_ Contact Person: \_\_\_\_\_

Number of Nights: 5 nights Hotel Rating: 3+

Name of School Sponsor/Date: Lisa Buckner 3/10/24

Signature of School Sponsor: Lisa Buckner Digitally signed by Lisa Buckner  
Date: 2024.03.10 21:17:22 -04'00' Cell #: 865-207-7036

*Minimum requires teacher to student ratio:*  
PreK – 3 yr olds 1:4    K-2<sup>nd</sup> 1:6    3<sup>rd</sup>-4<sup>th</sup> 1:10    5<sup>th</sup>-8<sup>th</sup> 1:12    9<sup>th</sup>-12<sup>th</sup> 1:15  
4 yr olds 1:6

# of Students: 20

# of Adults: 6

Chaperone/Student Ratio: 1:3

Professional Staff Chaperone(s)

- 1. Name: Lisa Buckner Cell #: 865-207-7036
- 2. Name: Mark Buckner Cell #: 865-228-4270
- 3. Name: Christopher Scott Cell #: 865-223-4098
- 4. Name: Janie Shanafield Cell #: 865-405-9435

Other Chaperone(s):

- 1. Name: Bob Slattery Cell #: 865-548-0549
- 2. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 3. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

Field Trips which exceed \$25,000 or involve out of the country travel require School Board approval, regardless of fund raising, Booster Club participation or other contributions. Please follow these guidelines when requesting approval of such trip:

1. Submit an "Item for Action" for the Board Agenda (Principals have directions on submitting Board Agenda items).
2. Attach as documentation the following items"
  - Completed Campus Leave Request
  - Details of Trip/Itinerary
  - Justification/Explanation of Cost (per student/chaperone/total)
  - Financial Arrangements for students who cannot afford trip (if any)
  - Insurance Details
  - Out of country travel requires a release for each student participant

Financial Arrangements: (please indicate method)

No Cost   
  Paid by Students   
  Paid by School   
  Paid by School System

Substitute Required    Acct to be charged for Substitute \_\_\_\_\_

\$ approx 650 Per Student    TOTAL TRIP AMOUNT: \$ 20,000

Provisions for those students unable to pay: \_\_\_\_\_

Scholarships will be found for students unable to pay.

Other information, comments, and special arrangements: (foreseeable hazards must be identified)

Driving to&from Oak Ridge to airport: Dr. & Mrs Buckner, Janie Shanafield, Bob Slattery & parents Christopher Scott is transporting trailer & robot in truck there and back and be chaperoning.

Staff Member: Lisa Buckner Digitally signed by Lisa Buckner  
Date: 2024.03.10 21:22:18 -04'00'

Date: 3/10/24

Athletic Director: \_\_\_\_\_

Date: \_\_\_\_\_

**This Section for Athletic Trips Only**

At the high school level up to three events and/or tournaments per season can involve an overnight trip. However, no more than one day of school may be missed for these trips. (Under certain conditions, the Superintendent of Schools or designee may approve additional events.? These trips must be paid entirely from funds outside the Oak Ridge High School Athletic Department. TSSAA Tournament games would be an exception to this policy. (All overnight trips involving middle school athletics require Superintendent or designee approval.)

Number of overnight trips (including this request) requested during the current school year: \_\_\_\_\_

Athletic Director Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Principal's Action:  Approved:  Disapproved:

Principal's Signature: Beth Gustip

Date: 3.11.24

Superintendent or Designee's Action: Approved:  Disapproved:

Superintendent or Designee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Board Approval Date (if required): \_\_\_\_\_



# Oak Ridge Schools – Campus Leave/Field Trip Permission Form

Name of Group: ORHS Secret City Wildbots

Destination: George Brown Convention Center, Houston, Texas

Mode of Transportation: Vans/Plane/Rental Vans Purpose: To compete in Worlds robotics competition

Date: 4 / 16 / 24 Time: 5:30 am to Date: 4 / 21 / 24 Time: 10:00 pm

Expected Number of Participants: 20 Expected Number of Chaperones: 4

Teacher/Sponsor of Trip: Lisa Buckner *Lisa Buckner*

Principal: Mr. Drayton Hawkins *B. Hawkins* 3-11-24

Fee Requested (if any)\*  
 \*In the course of learning throughout the school year, there are always opportunities to go above and beyond what the basic curriculum requires. In such cases, it is customary for the school to request a fee in order to cover the cost of these enhancements. These fees are in no way required and your child will not be denied the opportunity to participate or benefit from any curricular offering as a result of not paying a requested fee. The fees simply allow the district to offset the cost of any additional opportunities.

PARENT: Please separate this form and return to: Mrs. Buckner by: 4/10/24  
 (Teacher) (Date)

My child \_\_\_\_\_ has my permission to go on the Oak Ridge Schools field trip as described above. He/She will abide by the rules of Oak Ridge School and any special rules of the sponsor.

I have read and understand the activities my child will be involved with on this field trip. I understand that the Oak Ridge School System will provide adequate supervision, but as with any activity, injuries may occur. The School System is responsible only for injuries that result from the negligence of their staff. With my signature, I also authorize emergency medical treatment for my child.

I will be responsible for the damage to personal property of others or injury to other people caused by my son/daughter.

\_\_\_\_\_  
 Parent/Guardian (printed)

\_\_\_\_\_  
 Parent/Guardian (signature) \_\_\_\_\_  
 Date

Please provide 2 Emergency Contact Phone Numbers

_____ Name/Relationship	_____ Number
_____ Name/Relationship	_____ Number

## Secret City Wildbots 2024 Houston Survival Guide

### Event Venue:

George R. Brown Convention Center

### Coach/Chaperone Phone Numbers:

(865) 223-4098 Mr. Scott

(865) 207-7036 Mrs. Buckner

(865) 228-4270 Dr. Buckner

(865) 405-9435 Janie Shanafield

**Lodging:** Still working on this

We will leave the ORHS parking lot outside the Robotics Room on Tuesday, April 16, 2024. Time to be determined based on flight information. When we land, we will pick up rental vans at airport in Houston and travel to our lodging accommodations. (still working on this)

Unloading, Pit Set up, and the Competition will begin Wednesday and continue through Saturday. On Sunday, our Southwest flight #WN1586 leaves Houston at 1:05 pm and will arrive in Nashville at 2:55 pm and we hope to be back in Oak Ridge by 8:30 pm. We will stop to eat dinner on the way home from the airport.

**Costs: (Working these costs out)**

**Flight Cost:**

**Food costs:**

**Lodging & Transportation costs:**

**ALSO, donations of Bottled Water & snack foods (please pick something your student will eat) are requested – Plan to bring these by April 15<sup>th</sup> (We will send these with Christopher Scott with the pit stuff and they will be used daily for snacks)**

**Medication:** Medicines must be clearly labeled and placed in an appropriately sized zip-lock bag. Instructions should be written out for specific dosage and time on separate sheet of paper and placed inside the plastic bag with the medicine. **All medicines will be given to Mrs. Buckner before loading on the day of departure.** Students may not keep their own medicines in their rooms. If desired, sign the attached Non-Prescription Medicine form for dispensing of certain non-prescription medications.

**Flight Information: (Will work this out when we know for certain we have an invitation)**

### What to Bring on Trip:

**Snacks & Water:** Students are encouraged to bring non-perishable snack foods and water to the competition – as snacks will be expensive at the competition. It should be easy to put water and a few snacks into their backpacks each day. We will be there ALL DAY long. We will send snacks with Mr. Scott in the trailer so we will need these by Saturday, April 15<sup>th</sup>.

**Clothes:** Be sure and pack **TEAM SHIRTS!** These should be worn Wednesday, Thursday, Friday and Saturday. Also, **MASKS** will be required inside the convention center, so bring plenty, they will not be providing them. Also make sure you have **Comfortable, CLOSE-TOED SHOES** and **BRING**

**YOUR SAFETY GLASSES** (if you have them at home) I also suggest you bring an umbrella or a rain jacket...just in case!

**Behavior:** (Please review these with your parents) Remember you are representing ORHS, the Secret City Wildbots and FIRST! No students leaving our lodging or convention premises without permission from Mr. Scott, Dr. Buckner, or Mrs. Buckner. No students leaving their rooms after curfew without mentor permission. No girls in boys' rooms and no boys in girls' rooms! Anyone breaking this rule will be sent home immediately! **NO EXCEPTIONS!** Anyone out of his or her room will be sent home the next morning at your own expense. **NO EXCEPTIONS!**

**PARENTS\*\*\*\*FYI:** Go to <https://www.twitch.tv/firstinspires> This should be working Wednesday (practice matches) and Thursday & Friday (Qualification Matches) and Saturday. When we get our division and match schedules, we will post it on Slack and on Twitter! We hope you will watch our matches!\*\*\*\*

## **Secret City Wildbots 2024 Houston (TENTATIVE) Itinerary (4/16/24 – 4/24)**

### **Tuesday, April 16, 2024**

5:30 am – Leave Oak Ridge High School  
7:00 am – Arrive Nashville International Airport  
8:30 am – Leave Nashville for Houston on Southwest Airlines  
10:40 am – Arrive Houston IAH Airport  
11:15 am – Head to Johnson Space Center for Tour  
1:00 pm – Tour Johnson Space Center  
5:00 pm – Leave Johnson Space Center for dinner  
8:00 pm – Arrive at Airbnb

### **Wednesday April 17, 2024**

9:30 am – Arrive George R. Brown Convention Center for Unloading at 10:00 am  
12:00 pm – Hall of Fame Ceremony on Turing Field  
2:00 pm – Field Measurements for teams & Pits Open for teams  
3:00 pm – Safety Captains Meeting – Turing Field  
4:00 pm – Driver's Meeting on Galileo Field  
4:00 pm – Check in to VRBO & Cook Dinner (some of team)  
5:00 – 7:00 pm – Practice Matches  
7:30 pm – Leave Convention Center for Airbnb & Eat Dinner  
10:00 pm – Lights Out

### **Thursday April 18, 2024**

6:30 am – Head to Convention Center – Pits Open  
7:00 am – Pits Open  
7:30 am – Robot Sensor Calibration on fields  
8:30 am – Qualification Matches start  
11:00 am -1:30 pm – Staggered Lunch Breaks (each field 1 ½ hours)  
6:30 pm – Pits and Machine Shops Close  
7:00 pm – Dinner at Airbnb

### **Friday, April 19, 2024**

6:30 am – Head to Convention Center – Pits Open  
7:00 am – Pits Open  
8:00 am – Qualification Matches begin  
11:00 am -1:30 pm – Staggered Lunch Breaks (each field 1 ½ hours)  
5:00 pm – Division Award Ceremonies  
6:00 pm – Pits and Machine Shops Close  
7:00 pm – Dinner at Airbnb

### **Saturday, April 20, 2024**

6:30 am – Head to Convention Center  
7:00 am – Pits Open & Chairman's Finalists & Alliance Selections  
8:30 am – 11:30 am – Division Playoffs  
8:30 am – 11:30 4:00 pm – Load Out  
11:30 am – 1:30 pm – Lunch Break  
1:30 pm – 2:15 pm Closing Celebration  
2:00 pm – Pits Close  
2:15 – 5:30 pm Event Finale, Einstein Round Robin & Final Matches  
7:00 pm – Dinner Celebration at Airbnb

**Sunday, April 21, 2024**

8:30 am – Breakfast and Pack Vans for Airport

10:00 am – Leave for Houston IAH Airport to drop Vans

1:05 pm – Depart Houston on Southwest Airlines

2:55 pm – Arrive Nashville

5:00 pm – Stop for Dinner enroute

8:00 pm – Arrive in Oak Ridge

**Oak Ridge High School**  
**Permission to Administer Non-Prescription Medications**

I hereby give my permission for my child \_\_\_\_\_ to receive treatment of a non-emergency medical nature. This would include administering medication such as:

Medication	Yes	NO
Acetaminophen (Tylenol)		
Ibuprofen (Advil)		
Benadryl		
Calamine Lotion		
Neosporin or First Aid Creme		
Antacid Tablets/Liquids		
Imodium A/D		
Cold and Sinus Tablets		
Bee/Insect Sting		

Comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Parent / Guardian Signature \_\_\_\_\_ / \_\_\_\_\_  
 Date

State Farm®  
Providing Insurance and Financial Services



PO Box 2358  
Bloomington IL 61702-2358

Looking for your auto ID cards? Here they are. You have options . . .

- Print your cards and keep them in your car.
- You can access your digital cards through our app.

If you requested replacement cards, we'll mail a paper copy to you.

If these versions of your ID cards are not accepted by law enforcement or your local Department of Motor Vehicles office, please contact your agent for help.

Thank you for choosing State Farm® for your insurance needs.

**IMPORTANT - IDENTIFICATION CARDS**  
**STATE FARM**

<p><b>TENNESSEE INSURANCE CARD</b></p>	
INSURED	BUCKNER, MARK ALAN & LISA H
MUTL VOL.	
POLICY NUMBER	835 3446-C20-42L
EFFECTIVE	YR 2018 MAKE HYUNDAI MAR 20 2023 TO SEP 20 2023
MODEL	KONA VIN KM8K5CA51JU063717
AGENT	JOSH ELLIS INSURANCE AGCY INC 2473-A25
PHONE	(865)223-5461 NAI0 25178
<p><b>A BODILY INJURY/PROPERTY DAMAGE LIABILITY</b>  <b>C MEDICAL PAYMENTS</b>  <b>D 250 DEDUCT COMPREHENSIVE</b>  <b>G 250 DEDUCT COLLISION</b>  <b>H, R1, U1, S</b></p>	
SEE REVERSE SIDE FOR ADDITIONAL COVERAGE INFORMATION	

<p><b>THIS CARD MUST BE CARRIED IN THE INSURED MOTOR VEHICLE FOR PRODUCTION UPON DEMAND</b>          If Coverage A is indicated on the reverse side of this card, then the coverage provided by the policy meets the requirements of the Tennessee Financial Responsibility Law of 1977.</p>															
<p><b>IF YOU HAVE AN ACCIDENT - NOTIFY THE POLICE IMMEDIATELY</b>          1. Get names, addresses, and phone numbers of persons involved and witnesses. Also get driver license numbers of persons involved and license plate numbers/states of vehicles.          2. Don't admit fault or discuss the accident with anyone but State Farm or police.          3. Promptly notify your agent, log on to statefarm.com®, or use the State Farm mobile app to file a claim.</p>															
<p>For EMERGENCY ROAD SERVICE use the State Farm mobile app, log on to statefarm.com, or call 1-877-627-5767. <b>EXAMINE POLICY EXCLUSIONS CAREFULLY. THIS FORM DOES NOT CONSTITUTE ANY PART OF YOUR INSURANCE POLICY.</b>          How to identify your coverage. See policy for full name and definition</p> <table border="0"> <tr> <td>A Liability</td> <td>L Physical Damage</td> <td>U Uninsured Motor Vehicle-BI</td> </tr> <tr> <td>C Medical Payments</td> <td>R1 Car Rental and Travel Expenses</td> <td>U1 Underinsured Motor Vehicle</td> </tr> <tr> <td>D Comprehensive</td> <td>S Death Dismemberment and</td> <td>BI/PD</td> </tr> <tr> <td>G Collision</td> <td>Loss of Sight</td> <td>UNOC Use of Nonowned Cars</td> </tr> <tr> <td>H Emergency Road Service</td> <td></td> <td>Z Loss of Earnings</td> </tr> </table>	A Liability	L Physical Damage	U Uninsured Motor Vehicle-BI	C Medical Payments	R1 Car Rental and Travel Expenses	U1 Underinsured Motor Vehicle	D Comprehensive	S Death Dismemberment and	BI/PD	G Collision	Loss of Sight	UNOC Use of Nonowned Cars	H Emergency Road Service		Z Loss of Earnings
A Liability	L Physical Damage	U Uninsured Motor Vehicle-BI													
C Medical Payments	R1 Car Rental and Travel Expenses	U1 Underinsured Motor Vehicle													
D Comprehensive	S Death Dismemberment and	BI/PD													
G Collision	Loss of Sight	UNOC Use of Nonowned Cars													
H Emergency Road Service		Z Loss of Earnings													

KEEP A CARD IN YOUR CAR.  
 THIS CARD IS INVALID IF THE POLICY FOR WHICH IT WAS ISSUED LAPSES OR IS TERMINATED.  
**KEEP YOUR CURRENT CARD UNTIL THE EFFECTIVE DATE OF THIS CARD.**  
 MANY STATES REQUIRE EVIDENCE OF INSURANCE ON DEMAND. ONE OF THESE CARDS SHOULD BE CARRIED IN THE VEHICLE AT ALL TIMES.  
 Emergency Road Service Information is located on your Insurance card.

**IMPORTANT - IDENTIFICATION CARDS**  
**STATE FARM**

<p><b>TENNESSEE INSURANCE CARD</b></p>	
INSURED	BUCKNER, MARK ALAN & LISA H
MUTL VOL.	
POLICY NUMBER	835 3446-C20-42L
EFFECTIVE	YR 2018 MAKE HYUNDAI MAR 20 2023 TO SEP 20 2023
MODEL	KONA VIN KM8K5CA51JU063717
AGENT	JOSH ELLIS INSURANCE AGCY INC 2473-A25
PHONE	(865)223-5461 NAI0 25178
<p><b>A BODILY INJURY/PROPERTY DAMAGE LIABILITY</b>  <b>C MEDICAL PAYMENTS</b>  <b>D 250 DEDUCT COMPREHENSIVE</b>  <b>G 250 DEDUCT COLLISION</b>  <b>H, R1, U1, S</b></p>	
SEE REVERSE SIDE FOR ADDITIONAL COVERAGE INFORMATION	

<p><b>THIS CARD MUST BE CARRIED IN THE INSURED MOTOR VEHICLE FOR PRODUCTION UPON DEMAND</b>          If Coverage A is indicated on the reverse side of this card, then the coverage provided by the policy meets the requirements of the Tennessee Financial Responsibility Law of 1977.</p>															
<p><b>IF YOU HAVE AN ACCIDENT - NOTIFY THE POLICE IMMEDIATELY</b>          1. Get names, addresses, and phone numbers of persons involved and witnesses. Also get driver license numbers of persons involved and license plate numbers/states of vehicles.          2. Don't admit fault or discuss the accident with anyone but State Farm or police.          3. Promptly notify your agent, log on to statefarm.com®, or use the State Farm mobile app to file a claim.</p>															
<p>For EMERGENCY ROAD SERVICE use the State Farm mobile app, log on to statefarm.com, or call 1-877-627-5767. <b>EXAMINE POLICY EXCLUSIONS CAREFULLY. THIS FORM DOES NOT CONSTITUTE ANY PART OF YOUR INSURANCE POLICY.</b>          How to identify your coverage. See policy for full name and definition</p> <table border="0"> <tr> <td>A Liability</td> <td>L Physical Damage</td> <td>U Uninsured Motor Vehicle-BI</td> </tr> <tr> <td>C Medical Payments</td> <td>R1 Car Rental and Travel Expenses</td> <td>U1 Underinsured Motor Vehicle</td> </tr> <tr> <td>D Comprehensive</td> <td>S Death Dismemberment and</td> <td>BI/PD</td> </tr> <tr> <td>G Collision</td> <td>Loss of Sight</td> <td>UNOC Use of Nonowned Cars</td> </tr> <tr> <td>H Emergency Road Service</td> <td></td> <td>Z Loss of Earnings</td> </tr> </table>	A Liability	L Physical Damage	U Uninsured Motor Vehicle-BI	C Medical Payments	R1 Car Rental and Travel Expenses	U1 Underinsured Motor Vehicle	D Comprehensive	S Death Dismemberment and	BI/PD	G Collision	Loss of Sight	UNOC Use of Nonowned Cars	H Emergency Road Service		Z Loss of Earnings
A Liability	L Physical Damage	U Uninsured Motor Vehicle-BI													
C Medical Payments	R1 Car Rental and Travel Expenses	U1 Underinsured Motor Vehicle													
D Comprehensive	S Death Dismemberment and	BI/PD													
G Collision	Loss of Sight	UNOC Use of Nonowned Cars													
H Emergency Road Service		Z Loss of Earnings													

KEEP A CARD IN YOUR CAR.  
 THIS CARD IS INVALID IF THE POLICY FOR WHICH IT WAS ISSUED LAPSES OR IS TERMINATED.  
**KEEP YOUR CURRENT CARD UNTIL THE EFFECTIVE DATE OF THIS CARD.**  
 MANY STATES REQUIRE EVIDENCE OF INSURANCE ON DEMAND. ONE OF THESE CARDS SHOULD BE CARRIED IN THE VEHICLE AT ALL TIMES.  
 Emergency Road Service Information is located on your Insurance card.

DRIVER LICENSE

USA  
TN

DUP

*Tennessee*  
THE VOLUNTEER STATE



DL NO. **076761752** DOB **12/22/1967**

EXP **12/15/2025** ISS **11/21/2019**

CLASS **D** END **NONE**

REST **NONE**

SEX **F** HGT **5'-04"** EYES **BLU**

DD **7201911211445167**

**BUCKNER**  
**LISA MICHELLE**  
**942 W OUTER DR**

**OAK RIDGE, TN 37830-8243**

*Lisa Buckner*

DRIVER LICENSE



USA  
TN

DUP

Tennessee  
THE VOLUNTEER STATE



DL NO **055254524** DOB **06/22/1963**

EXP **06/23/2026** ISS **11/27/2019**

CLASS **D** END **NONE**

REST **NONE**

SEX **M** HGT **5'10"** EYES **BRO**

DD **7201911271522967**

**BUCKNER  
MARK ALAN**

**942 W OUTER DR**

**OAK RIDGE, TN 37830-8243**

*Mark Alan Buckner*

**Oak Ridge Schools**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

School: Jefferson middle

Date: 2/26/24

*The following group requests permission to leave the school campus to participate in the educational activity indicated below. Parental permission to be obtained for each student.*

Class/Group Requesting Permission: JMS Master Builders

Educational Activity: STEM - FIRST LEGO League

project presentations, engineering, programming, core values

Destination: Houston, TX George R. Brown Convention Center

Purpose of Trip: Qualified to compete in the world championship for First with FIRST LEGO League

Departure Date: 4/16/24

Departure Time: Variable based on parent travel plans

Return Date: 4/21/24

Return Time: \_\_\_\_\_

Name of School Sponsor: Lexie Scott

Cell #: 865-604-2379

# of Students: 7

# of Adults: 9

Chaperone/Student Ratio: 7:9

*Minimum required teacher to student ratio:*

*Pre-K - 3 year olds 1:4    K-2<sup>nd</sup> 1:6    3<sup>rd</sup>-4<sup>th</sup> 1:10    5<sup>th</sup>-8<sup>th</sup> 1:12    9<sup>th</sup>-12<sup>th</sup> 1:15*  
*4 year olds 1:6*

Professional Staff Chaperone(s):

1. Name: Lexie Scott Cell #: 865 604-2379

2. Name: Sabrina Elrod Cell #: 865 765-4717

3. Name: Jane Shanafield Cell #: 865 405 9435

4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

Other Chaperone(s): Parents

1. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

2. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

3. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

# Oak Ridge Schools

## CAMPUS LEAVE REQUEST – Overnight Trip

Field Trips which exceed \$25,000 must be approved by the School Board, regardless of fund raising, Booster Club participation or other contributions. Please follow these guidelines when requesting approval of such trip:

1. Submit an "Item for Action" for the Board Agenda (Principals have directions on submitting Board Agenda Items).
2. Attach as documentation the following items:
  - Completed Campus Leave Request
  - Details of Trip/Itinerary
  - Justification/Explanation of Cost (per student/chaperone/total)
  - Financial Arrangements for students who cannot afford trip (if any)
  - Insurance Details
  - Out of country travel requires a release for each student participant.

Financial Arrangements: (please indicate method)

No Cost     Paid by Students     Paid by School     Paid by School System

Substitute Required    Acct to be charged for Substitute \_\_\_\_\_

\$ \_\_\_\_\_ Per Student    TOTAL TRIP AMOUNT: \$ \_\_\_\_\_

Provisions for those students unable to pay: This competition is optional.

If students attends, all financial, travel, hotel arrangements are parent responsibility

Other information, comments, and special arrangements: (foreseeable hazards must be identified)

Parent must travel and be responsible for their child duration of trip

Mode of Transportation: (circle below) Parent choice and responsibility

First Student    Transportation Contractor    School System Van    Air Travel

**Note: Only ORS employees are authorized to drive school system vans.**

School System Van – Name of Driver \_\_\_\_\_

Valid Driver's License Verified? Yes No    Verified by: \_\_\_\_\_

Attach copy/copies of driver's license

Transportation Contractor: \_\_\_\_\_ Phone #: \_\_\_\_\_

(Only approved transportation companies may be used, see ORS website for a list of approved companies)

Air Travel Flight #'s: \_\_\_\_\_

**Oak Ridge Schools**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

*Accommodations: Overnight lodging for students must be appropriately selected with student safety, quality of accommodations, cost and location to events as central considerations. Students should be appropriately assigned to rooms and an overnight adult supervision and contact plan should be established and communicated to students.*

Hotel/Motel Name: Parent Choice and responsibility to stay

Address: with their child

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Contact Person: \_\_\_\_\_

Number of Nights: 4 Hotel Rating: \_\_\_\_\_

School Sponsor Signature: Lexie Scott

Date: 2/28/24 Coach's hotel attached

**This Section for Athletic Trip Only**

*At the high school level up to three events and/or tournaments per season can involve an overnight trip. However, no more than one day of school may be missed for these trips. (Under certain conditions, the Superintendent of Schools or designee may approve additional events.) These trips must be paid entirely from funds outside the Oak Ridge High School Athletic Department. TSSAA Tournament games would be an exception to this policy. (All overnight trips involving middle school athletics require Superintendent or designee approval.)*

Number of overnight trips (including this request) requested during the current school year: \_\_\_\_\_

Athletic Director Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Principal's Action: Approved:  Disapproved:

Principal's Signature: [Signature] Date: 2/27/24

Superintendent or Designee's Action: Approved:  Disapproved:

Superintendent or Designee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Board Approval Date (if required): \_\_\_\_\_

Oak Ridge Schools  
CAMPUS LEAVE REQUEST - Overnight Trip

School: Jefferson Middle School Date: 2/27/24

The following group requests permission to leave the school campus to participate in the educational activity indicated below. Parental permission to be obtained for each student.

Class/Group Requesting Permission: Radio Active Brix FLL Team

Educational Activity: Compete against/collaborate with other

U.S. and international teams at the Western Edge FLL Open

Destination: Long Beach Convention Center (300 East Ocean Blvd. Long Beach, CA 90802)

Purpose of Trip: Students on the team have advanced from two previous competitions, now with the invitation to compete at this higher level.

Departure Date: 5/30/24 Departure Time: 6/2/24

Return Date: \_\_\_\_\_ Return Time: \_\_\_\_\_

Name of School Sponsor: T. Davis Cell #: (775) 223-2874

# of Students: 8 # of Adults: 2 Chaperone/Student Ratio: 1:4

Minimum required teacher to student ratio:  
Pre-K - 3 year olds 1:4 K-2<sup>nd</sup> 1:6 3<sup>rd</sup>-4<sup>th</sup> 1:10 5<sup>th</sup>-8<sup>th</sup> 1:12 9<sup>th</sup>-12<sup>th</sup> 1:15  
4 year olds 1:6

- Professional Staff Chaperone(s):
- Name: Theresa Davis Cell #: (775) 223-2874
  - Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
  - Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
  - Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

- Other Chaperone(s):
- Name: Julie Hartje Cell #: (865) 776-8586
  - Name: Families of teammembers Cell #: \_\_\_\_\_
  - Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
  - Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

## Oak Ridge Schools

### CAMPUS LEAVE REQUEST – Overnight Trip

Field Trips which exceed \$25,000 must be approved by the School Board, regardless of fund raising, Booster Club participation or other contributions. Please follow these guidelines when requesting approval of such trip:

1. Submit an "Item for Action" for the Board Agenda (Principals have directions on submitting Board Agenda Items).
2. Attach as documentation the following items:
  - Completed Campus Leave Request
  - Details of Trip/Itinerary
  - Justification/Explanation of Cost (per student/chaperone/total)
  - Financial Arrangements for students who cannot afford trip (if any)
  - Insurance Details
  - Out of country travel requires a release for each student participant.

Financial Arrangements: (please indicate method)

No Cost     Paid by Students     Paid by School     Paid by School System  
 Substitute Required    Acct to be charged for Substitute \_\_\_\_\_  
 \$ \_\_\_\_\_ Per Student    TOTAL TRIP AMOUNT: \$ \_\_\_\_\_

Provisions for those students unable to pay: \_\_\_\_\_

*Families are responsible for individual students' travel and hotel but we are hoping some fundraising will offset some costs (though we are not counting on that)*

Other information, comments, and special arrangements: (foreseeable hazards must be identified)

*The competition takes place at the end of the school year (final week), so no instruction will be missed. Parent must travel with and be responsible for their child.*

Mode of Transportation: (circle below)

First Student

Transportation Contractor

School System Van

Air Travel

*(Parent choice + responsibility)*

**Note: Only ORS employees are authorized to drive school system vans.**

School System Van – Name of Driver \_\_\_\_\_

Valid Driver's License Verified? Yes No    Verified by: \_\_\_\_\_

Attach copy/copies of driver's license

Transportation Contractor: \_\_\_\_\_ Phone #: \_\_\_\_\_

*(Only approved transportation companies may be used, see ORS website for a list of approved companies)*

Air Travel Flight #'s: \_\_\_\_\_

**Oak Ridge Schools**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

*Accommodations: Overnight lodging for students must be appropriately selected with student safety, quality of accommodations, cost and location to events as central considerations. Students should be appropriately assigned to rooms and an overnight adult supervision and contact plan should be established and communicated to students.*

Hotel/Motel Name: Hyatt Regency Long Beach (Coach only - parent/student accom. arranged by them)

Address: 200 S. Pine Ave., ~~Long Beach, CA~~ 90802

City: Long Beach State: CA Zip: 90802

Phone: (562) 491-1234 Contact Person: (562) 491-1234

Number of Nights: 3 Hotel Rating: 4 stars

School Sponsor Signature: T. [Signature]

Date: 2/27/24

**This Section for Athletic Trip Only**

*At the high school level up to three events and/or tournaments per season can involve an overnight trip. However, no more than one day of school may be missed for these trips. (Under certain conditions, the Superintendent of Schools or designee may approve additional events.) These trips must be paid entirely from funds outside the Oak Ridge High School Athletic Department. TSSAA Tournament games would be an exception to this policy. (All overnight trips involving middle school athletics require Superintendent or designee approval.)*

Number of overnight trips (including this request) requested during the current school year: \_\_\_\_\_

Athletic Director Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Principal's Action:    Approved:     Disapproved:

Principal's Signature: [Signature]    Date: \_\_\_\_\_

Superintendent or Designee's Action:    Approved:     Disapproved:

Superintendent or Designee's Signature: \_\_\_\_\_    Date: \_\_\_\_\_

Board Approval Date (if required): \_\_\_\_\_

3/4/24

---

# Memo

---

**TO**  
Executive Director

**FROM**  
Theresa Davis

**CC**  
None

**RE**  
Backup  
Documentation for  
JMS RadioActive Brix  
FLL Field Trip  
Request

**COMMENTS:**

Dear Executive Director,

Included in this documentation you will find the following items to back-up our request for approval of the JMS RadioActive Brix field trip to compete in the Western Edge Open in Long Beach California at the end of May 2024:

- Campus Leave Request—Overnight Trip
- Trip Itinerary and Potential Lodging Information

Thank you for your time and please feel free to reach out should you require any further information than what has been provided.

Sincerely,

Theresa Davis

[tedavis@ortn.edu](mailto:tedavis@ortn.edu)

(775) 223-2874

---

---

# RadioActive Brix 2024

## Western Edge Open Schedule and Important Notes

### □ Coach Contact Information:

- Ms. Davis: (775) 223-2874, [tedavis@ortn.edu](mailto:tedavis@ortn.edu)

### □ Schedule and Event Info:

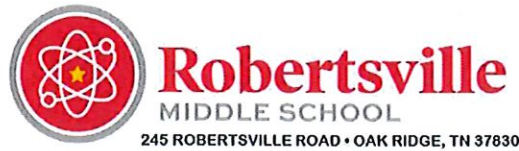
- Official Competition Dates: Friday, May 31st- Sunday, June 2nd
  - Since students will travel with their families, arrival is suggested to be Thursday afternoon and earliest suggested departure would be Sunday evening due to itinerary (*see below*)
- Venue: Long Beach Convention Center, 300 E Ocean Blvd., Long Beach, CA 90802 (located in Long Beach Harbor)
- Event Schedule:
  - Thursday, May 30th: Registration
    - Packet pick up for coaches (4-6 pm)
  - Friday, May 31st: Mini-Fig Trading Day
    - 8 am: Check-In begins
    - 8:30 am: Pit open for set up
    - 10:30 am: Opening Ceremony
    - 11:30 am: Practice rounds begin
    - 2:40 pm: 1<sup>st</sup> robot performance rounds
    - 7:30-9:00 pm: Team social/party
  - Saturday, June 1st: I Spy Saturday
    - 8 am: Pit open
    - 9 am: Judging begins for Innovation Project, Robot Design, and Core Values
    - 10:10 am: 2<sup>nd</sup> robot performance rounds
    - 12:40 pm: 3<sup>rd</sup> robot performance rounds
    - 3:00 pm onward: On the Spot Challenge Instructions (new for this event)
      - *Teams should meet up with their two other alliance teams between this time and the next day to code and prep for their On the Spot Challenge*
  - Sunday, June 2nd: Region Representation Attire
    - 8 am: Pit open
    - 9 am: On the Spot Round 1 begins
    - 10:35 am: On the Spot Round 2 begins
    - 2 pm (approx.): Closing Ceremony begins (*\*please note this as you plan flights for your family*)

□ **Accommodations:**

- Blocks of rooms at the two following locations very close to the competition venue have been set aside for reservations, with reduced pricing for your families compared to the usual cost for a stay in these places:
  - **The Westin Long Beach (333 E. Ocean Blvd, Long Beach, CA 90802)**
    - **Booking website for these reserved rooms:**  
<https://book.passkey.com/event/50768711/owner/3354/home>
  - **Hyatt Regency Long Beach (200 S Pine Ave., Long Beach, CA 90802)**
    - **Booking website for these reserved rooms:**  
<https://www.hyatt.com/en-US/group-booking/LGBRL/G-2THB>
      - *Coach Davis will be staying at the Hyatt to make sure we have a room in a hotel where one of the On the Spot challenge practice tables will be set up for the team.*
- You and your family are obviously free to stay anywhere you like since you will be paying; you may want to consider the cost of travel to and from the event venue and whether or not it is feasible for you to get team member to our team working location for Saturday afternoon/evening's On the Spot challenge planning with the rest of the team and our alliance grouping (TBD in April).

□ **Airports in the Surrounding Region:**

- Los Angeles Airport (LAX) is 21 miles from Long Beach
- Long Beach (LGB) airport is 10 miles from Long Beach
- John Wayne (SNA) airport is 30 miles from Long Beach
- Burbank (BUR) is 35 miles from Long Beach
- Ontario (ONT) is 54 miles from Long Beach
- San Diego (SAN) is 114 miles from Long Beach



A school community that creates a sense of belonging and promotes excellence.

### Memorandum of Support

**To:** Oak Ridge Schools Board of Education

**From:** Nicholas Corrigan, RMS Principal

**Date:** March 12, 2024

**Subject:** Support for the Annual Historic Triangle Overnight Field Trip to Williamsburg, VA

I am writing to express my strong support for the annual Historic Triangle Overnight Field Trip to Williamsburg, VA, for students in the 8th Grade American History Curriculum. This trip offers invaluable educational experiences that directly align with the curriculum and enhance students' learning outcomes. This year's field trip will take place from Saturday, May 25, 2024 through Monday, May 27, 2024. This trip will not take place on a school day and will be outside of regular school hours. It is not a class requirement nor tied to a grade. Collection of fees for this trip has been approved by the school principal and will be handled through the internal school account.

### Rationale for Support:

1. **Living History Experience:** Williamsburg, VA, serves as a living history museum, providing students with a unique opportunity to immerse themselves in the colonial era. By witnessing reenactments, exploring historic sites, and engaging with costumed interpreters, students can gain a deeper understanding of the time period they are studying in class.
2. **Connection to Curriculum:** The 8th Grade American History Curriculum covers topics such as the American Revolution, colonial life, and the formation of the United States. Students will visit Yorktown, Jamestown, and Williamsburg, VA which allows them to see firsthand the places where key events occurred and the daily lives of historical figures, making their learning more tangible and memorable.
3. **Critical Thinking Skills:** The field trip encourages students to think critically about history by analyzing primary sources, interpreting historical events, and making connections between the past and the present. This hands-on experience fosters a deeper appreciation for the complexities of American history.
4. **Cultural Enrichment:** Exposure to different historical perspectives and cultural practices in Williamsburg broadens students' worldview and promotes cultural sensitivity. By interacting with diverse historical narratives, students develop empathy and a more inclusive understanding of American history.

In conclusion, the Historic Triangle Overnight Field Trip to Williamsburg, VA, is an enriching educational opportunity that complements the 8th Grade American History Curriculum. I encourage the Board of Education to continue supporting this valuable experience for our students.

Respectfully,

Nick Corrigan, Principal

**OAK RIDGE SCHOOLS**  
**CAMPUS LEAVE REQUEST -- Overnight Trip**

Accommodations: Overnight lodging for students must be appropriately selected with student safety, quality of accommodations, cost, and location to events as central considerations. Students should be appropriately assigned to rooms and an overnight adult supervision and contact plan should be established and communicated to students.

School: Robertsville MS Date: 8/15/23

*The following group requests permission to leave the school campus to participate in the educational activity indicated below. Parental permission will be obtained for each student.*

Class/Group Requesting Permission: 8th grade Social Studies Classes

Educational Activity: 8th Grade End of Year Colonial Triangle Tour

Destination: Jamestown, Williamsburg, Yorktown, VA along with Monticello

Purpose of Trip: Coincides with SS curriculum

Departure Date: 5/25/24 (SAT) Departure Time: 5 am

Return Date: 5/27/24 (MON) Return Time: 8 pm - MEMORIAL DAY

Mode of Transportation: Motor Coach

First Student Transportation Contractor:  School System Van  Air Travel

NOTE: Only ORS employees are authorized to drive school system vans.

School System Van - Name of Driver: \_\_\_\_\_

Driver's License Verified by: \_\_\_\_\_ Attach copy of driver's license

Transportation Contractor: KTG-Olympus Car and Coach Phone #: 865-523-2796

*(Only approved transportation companies may be used. Refer to ORS website for list of approved companies)*

Air Travel Flight #'s: \_\_\_\_\_

Hotel/Motel Name: Fairfield Inn and Suites-Williamsburg

Address: 1402 Richmond Road

City: Williamsburg State: VA Zip: 23185

Phone: 757-645-3600 Contact Person: Sophia Harler

Number of Nights: 2 Hotel Rating: 4 out of 5 stars

Name of School Sponsor/Date: Scott A. Hinton 8/15/23

Signature of School Sponsor:  Cell #: 865-567-0802

*Minimum requires teacher to student ratio:*

PreK - 3 yr olds 1:4      K-2nd 1:6      3rd-4th 1:10      5th-8th 1:12      9th-12th 1:15  
4 yr olds 1:6

# of Students: 40

# of Adults: 4

Chaperone/Student Ratio: 1:10

Professional Staff Chaperone(s)

- 1. Name: Scott Hinton Cell #: 865-567-0802
- 2. Name: Nick Corrigan Cell #: 865-306-3452
- 3. Name: Rachel Frazier Cell #: 865-806-4833
- 4. Name: Julie Kinder Cell #: 865-919-0569

Other Chaperone(s):

- 1. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 2. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 3. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

Field Trips which exceed \$25,000 or involve out of the country travel require School Board approval, regardless of fund raising, Booster Club participation or other contributions. Please follow these guidelines when requesting approval of such trip:

1. Submit an "Item for Action" for the Board Agenda (Principals have directions on submitting Board Agenda Items).
2. Attach as documentation the following items"
  - Completed Campus Leave Request
  - Details of Trip/Itinerary
  - Justification/Explanation of Cost (per student/chaperone/total)
  - Financial Arrangements for students who cannot afford trip (if any)
  - Insurance Details
  - Out of country travel requires a release for each student participant

Financial Arrangements: (please indicate method)

No Cost     
  Paid by Students     
  Paid by School     
  Paid by School System

Substitute Required      Aoct to be charged for Substitute \_\_\_\_\_

\$ 619 Per Student      TOTAL TRIP AMOUNT: \$ 24,760

Provsions for those students unable to pay: we will conduct a fundrasier in the late fall  
winter to help offset costs for those that need help to pay

Other Information, comments, and special arrangements: (foreseeable hazards must be identified)

Busch Gardens will be part of our itinerary on Day 2. We will spend  
4-5 hours there in the evening

Staff Member: [Signature]

Date: 8/15/23

Athletic Director: \_\_\_\_\_

Date: \_\_\_\_\_

**This Section for Athletic Trips Only**

At the high school level up to three events and/or tournaments per season can involve an overnight trip. However, no more than one day of school may be missed for these trips. (Under certain conditions, the Superintendent of Schools or designee may approve additional events. These trips must be paid entirely from funds outside the Oak Ridge High School Athletic Department. TSSAA Tournament games would be an exception to this policy. (All overnight trips involving middle school athletics require Superintendent or designee approval.)

Number of overnight trips (including this request) requested during the current school year: \_\_\_\_\_

Athletic Director Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Principal's Action: Approved Disapproved:

Principal's Signature: [Signature]

Date: 8-17-23

Superintendent or Designee's Action: Approved: Disapproved:

Superintendent or Designee's Signature: [Signature]

Date: 8/16/23

Board Approval Date (if required): \_\_\_\_\_

# Colonial Connections

P.O. Box 502 • Williamsburg VA 23187  
(757) 268-3122 • Fax (757) 268-3006  
1-800-378-1571  
www.colonialconnections.com

Scott Hinton  
Robertsville MS  
245 Robertsville Rd  
Oak Ridge, TN 37830  
(865) 425-9201 ext. 2221  
Cell (865) 567-0802

August 14, 2023

## Contract for Services

Tour Dates: May 25-27, 2024  
Hotel: Fairfield Inn and Suites Williamsburg  
Motor Coach: Olympus Car and Coach (requested Kreis Baldrige)  
56 passenger coach  
Package cost: Package is based on a minimum of 40 paying students:  
Student package is net, per person and based on occupancy:  
Quad Occupancy \$619 Triple Occupancy \$ 639  
Double Occupancy \$689 Single Occupancy \$839 .

Package inclusions: Round trip motor coach transportation; Two nights lodging; Tour Manager; breakfast each morning; three lunches provided; two dinners provided. Admissions to Colonial Williamsburg, Jamestown Settlement, American Revolution Museum, and Monticello; Busch Gardens; driver and tour manager gratuities, four staff complimentary trips, utilizing 2 rooms.

### Contractual Dates and Deadlines:

September 10, 2023	Signed contract
January 20, 2024	\$50.00 per person deposit
March 1, 2024	Second deposit of \$100 per person
April 15, 2024	Rooming list due
May 1, 2024	Full and final payment

Cancellations may be made until April 1, 2024 without penalty. Should the 40 minimum paying participants not be secured an increase in cost may be needed to obtain the same itinerary.

Authorized Signature: \_\_\_\_\_

*Bruce Barber*

Date: \_\_\_\_\_

*8-17-23*

Colonial Connections: \_\_\_\_\_

*Sophi Harler*  
Sophia Harler

Date: August 14, 2023

# Robertsville Middle School

DATES:

Lead teacher: Scott Hinton 865.567.0802  
Tour Director:  
Coach operator:

## Day One

4:30am Olympus Motorcoach arrives at Robertsville Middle School  
245 Robertsville, Oak Ridge, TN 37830  
4:45am Group reports to school  
5:15am Depart for Williamsburg, VA  
1:30pm Arrival in Jamestown Settlement. Met by Tour Director  
Boxed Lunch provided 13 Turkey, 15 Ham, 12 PBJ (40 lunches, includes driver and TD)  
2:30pm 2 Hour guided tour of Jamestown Settlement (2 groups)  
4:30pm Load coaches and depart for dinner  
5:00pm Dinner at Sal's by Victor -- Scheduled for 5:00pm  
6:15pm Check in at hotel: Fairfield Inn and Suites  
1402 Richmond Rd, Williamsburg VA  
Driver must be off duty DOT regulations  
7:00pm Early American Medical program  
Swimming at indoor pool/ no life guard/ swim at own risk  
Chaperones must be present in pool area with students  
9:00pm Private security

## Day Two

7:30am Deluxe continental breakfast provided  
8:30am Depart for sightseeing  
9:00am Three-hour guided tour of Colonial Williamsburg (2 groups)  
Noon Enjoy shopping and lunch in Merchants Square (\$15 provided p.p.)  
2:00pm Load coach  
2:30pm 2-hour guided tour of The American Revolutionary Museum of Yorktown (2 groups)  
4:30pm Depart for Busch Gardens Williamsburg  
Silver meal Certificate provided for dinner at Park/ suggest everyone eat before 8pm  
Driver will take tour guide back to hotel after dropping group at Busch  
10:00pm Private security

## Day Three

7:00am Deluxe continental breakfast provided  
Check out and load coach  
8:15am Depart for Charlottesville, VA  
10:30am Arrival at Monticello, home of Thomas Jefferson  
Take Shuttle to top of the mountain  
11:20am House Tour time 25 tickets  
11:25am House Tour time 9 tickets  
Visit grounds  
Take shuttle back to coach  
12:45pm Load coach and depart for Michie Tavern  
1:00pm Lunch provided at Michie Tavern  
2:00pm Depart for home  
Dinner On Own (one hour allotted time)  
9:00pm Approximate arrival at Robertsville Middle School

## HISTORIC COLONIAL TRIANGLE TOUR 2024

October 18, 2023

Dear Parents/Guardians,

The eighth grade Social Studies teachers at Robertsville are extremely pleased to announce the plans for the 2024 eighth grade tour of the Historic Colonial Triangle in Virginia. In past years, this trip has proven to be a highlight of students' middle school experience, and we hope to make the 2024 trip the best ever! The dates of the trip have been set for **May 25-27, 2024**. The total cost of the trip will be **\$600.00** (based on a minimum of 40 students, maximum of 50) and will include the following:

-Admission to ALL attractions:

Colonial Williamsburg and Governor's Mansion  
Historic Jamestown Settlement  
Yorktown Victory Center/American Revolution Museum  
Thomas Jefferson's home, Monticello  
Busch Gardens-Williamsburg

-Transportation via chartered motor coach

- 2 Night Hotel accommodations at Fairfield Inn and Suites Williamsburg (Quadruple occupancy)

- 7 total meals: lunch on Day 1 through lunch at the Historic Michie Tavern on Day 3

-Security Guard service at the Hotel 11:00 pm to 6:00 am

-All taxes and gratuities

### Payment Information

Three (3) payment dates are being established. If your child is eligible and interested in attending the trip, **please send a \$150.00 deposit to reserve his/her spot (cash or check/money order payable to RMS) with your child the week of November 13-17, 2023**. Money will be collected on a first come, first serve basis beginning at 7:05 each morning in Coach Hinton's classroom 231. If the trip reaches 50 participants, a waiting list will be established. Please do not turn in any money prior to November 13<sup>th</sup> or to your child's homeroom teacher. **The 2<sup>nd</sup> installment of \$200 will be due the week of February 5-9, 2024. The 3<sup>rd</sup> and final installment of \$250 will be due April 8-12, 2024.**

### Fundraiser Information

Participants in the tour will have the opportunity to participate in a fundraiser which Mrs. Frazier will be putting together that will help offset the cost of the individuals total cost of the tour. The fundraiser opportunity will take place upon our return from Winter Break in January and any funds raised will go towards offsetting a participant's final payment for the tour. **Only the participants in the tour will have the opportunity to participate in the fundraiser.**

### Permission Slip Information

Permission slips and medical forms will be sent home upon making the 2<sup>nd</sup> installment payment in February.

### Room Sign-Ups

Room sign-ups will take place during the final payment collection in April. Students will be housed 4 to a room. Any student that does not sign up for a room will automatically be placed in a room with an opening.

## HISTORIC COLONIAL TRIANGLE TOUR 2024

### Refund Information

Request for refunds on deposits and 2<sup>nd</sup> payments may be made by contacting the tour coordinator prior to April 12, 2024. If plans change, please communicate as quickly as possible so arrangements can be made to process the refund in a timely manner. Once the final payment is made and the rooming list sent to the tour company at the end of the final payment collection on April 12, no refund requests can be honored. Therefore, **REFUNDS WILL NOT BE GRANTED/GUARANTEED AFTER APRIL 12, 2024. THIS INCLUDES ANY STUDENT REMOVED FOR DISCIPLINARY CONSEQUENCES.**

### Itinerary

A detailed itinerary with specific departure and return times along with packing lists will be sent home with participants approximately 2-4 weeks prior to the trip.

### ELIGIBILITY FOR TOUR

Disqualifying factors are as follow:

- Assigned OSS at any point in time during the school year
- Multiple instances resulting in RLC will not be permitted to attend the trip
- Misbehavior on previous field trip
- 10 unexcused absences

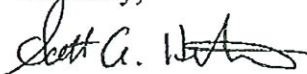
Also note that it is a possibility that students meeting any of the criteria below will not be permitted to attend the trip as well:

- 2 full days in the RLC during the spring semester
- Failing grades in 2 or more classes

\*A conference will be required with school administration, myself, and the student to determine eligibility

If you have any questions, please feel free to contact me at Robertsville, 425-9201 or email: [shinton@ortn.edu](mailto:shinton@ortn.edu).

Sincerely,



Scott A. Hinton  
Tour Coordinator



P.O. Box 502 • Williamsburg VA 23187  
(757) 258-3122 • Fax (757) 258-3665  
1-800-378-1571  
www.colonialconnections.com

Scott Hinton  
Robertsville MS  
245 Robertsville Rd  
Oak Ridge, TN 37830  
(865) 425-9201 ext. 2221  
Cell (865) 567-0802

August 14, 2023

**Contract for Services**

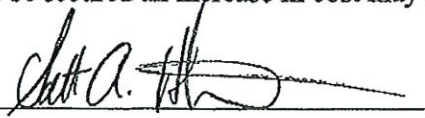
Tour Dates: May 25-27, 2024  
Hotel: Fairfield Inn and Suites Williamsburg  
Motor Coach: Olympus Car and Coach (requested Kreis Baldrige)  
56 passenger coach  
Package cost: Package is based on a minimum of 40 paying students:  
Student package is net, per person and based on occupancy:  
Quad Occupancy \$619 Triple Occupancy \$ 639  
Double Occupancy \$689 Single Occupancy \$839 .

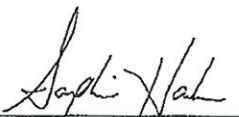
Package inclusions: Round trip motor coach transportation; Two nights lodging; Tour Manager; breakfast each morning; three lunches provided; two dinners provided. Admissions to Colonial Williamsburg, Jamestown Settlement, American Revolution Museum, and Monticello; Busch Gardens; driver and tour manager gratuities, four staff complimentary trips, utilizing 2 rooms.

**Contractual Dates and Deadlines:**

September 10, 2023	Signed contract
January 20, 2024	\$50.00 per person deposit
March 1, 2024	Second deposit of \$100 per person
April 15, 2024	Rooming list due
May 1, 2024	Full and final payment

Cancellations may be made until April 1, 2024 without penalty. Should the 40 minimum paying participants not be secured an increase in cost may be needed to obtain the same itinerary.

Authorized Signature:  Date: 8/18/23

Colonial Connections:  Date: August 14, 2023  
Sophia Harler

**Oak Ridge Schools**

**6th Attendance Period**

**March 7, 2024**

These numbers reflect the **2023-2024** Skyward Student Management System (Entity) active student enrollment count as of **March 7, 2024**.

The total includes **43** private school and home-schooled students receiving Special Ed services.



# Oak Ridge Schools

## Enrollment Entity Counts 6th RP 2023-24

March 7, 2024

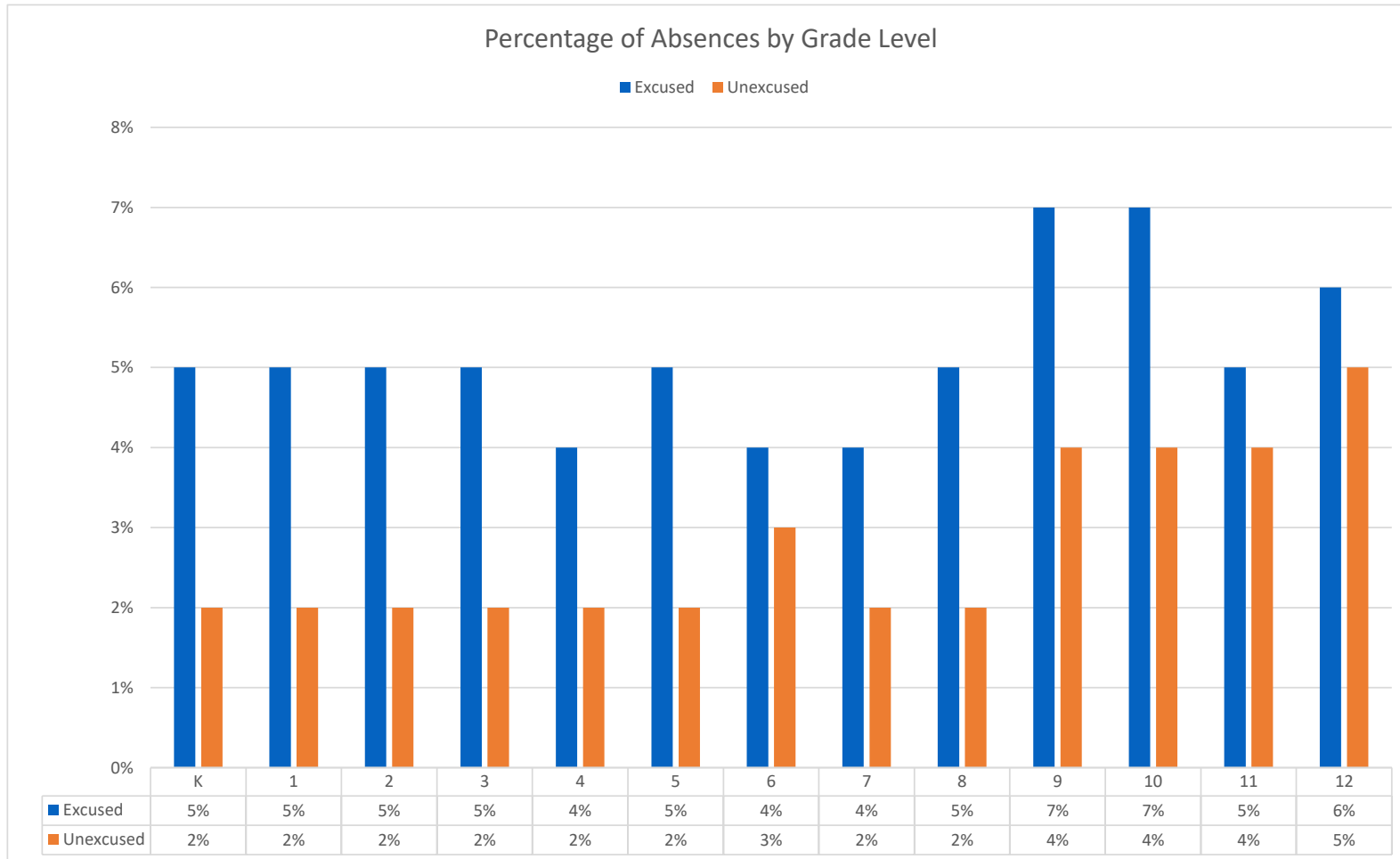
School	P3	P4	K	1	2	3	4	5	6	7	8	9	10	11	12	Total PK-12 2023-24	Previous 5th RP 2023-24	Diff	Total PK-12 2022-23
Preschool	118	129														247	244	3	231
Glenwood			72	81	75	63	76									367	372	-5	335
Linden			106	101	102	95	117									521	522	-1	542
Willow Brook			92	78	84	85	82									421	423	-2	398
Woodland			80	83	99	102	96									460	457	3	414
JMS								172	184	162	209					727	729	-2	715
RMS								189	172	179	206					746	739	7	703
ORHS												416	407	383	362	1568	1574	-6	1557
<b>Enrollment 2023-24</b>	<b>118</b>	<b>129</b>	<b>350</b>	<b>343</b>	<b>360</b>	<b>345</b>	<b>371</b>	<b>361</b>	<b>356</b>	<b>341</b>	<b>415</b>	<b>416</b>	<b>407</b>	<b>383</b>	<b>362</b>	<b>5057</b>	<b>5060</b>	<b>-3</b>	<b>4895</b>
Prev. 5th RP 2023-24	113	131	351	342	361	346	374	363	357	339	409	420	409	382	363	5060			
Difference	5	-2	-1	1	-1	-1	-3	-2	-1	2	6	-4	-2	1	-1	-3			

This report compares the 2023-24 6th RP period enrollment with the 2023-24 5th RP period.



# Attendance Graphs

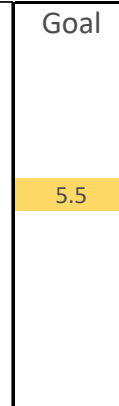
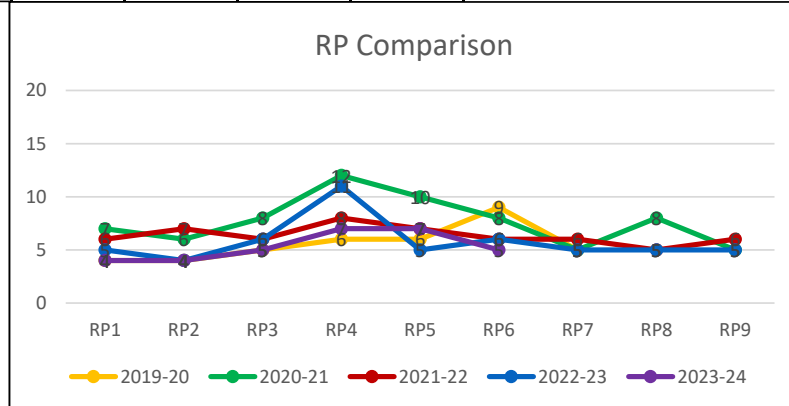
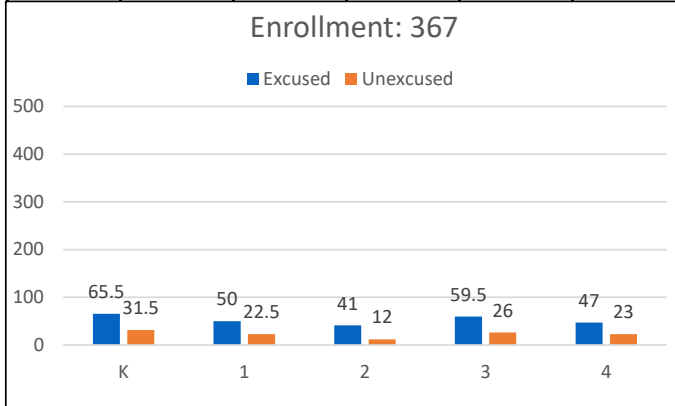
The graphs below display excused and unexcused absence totals, entity counts, and attendance percentages by grade and reporting period. The data was compiled using information from attendance detail and summary reports and entity counts reports.  
Reporting Period 6: 1/29/2023-2/26/2024



\* Percentages have been rounded to the nearest whole number.

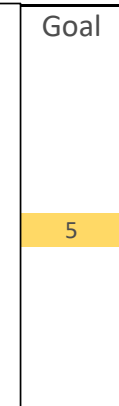
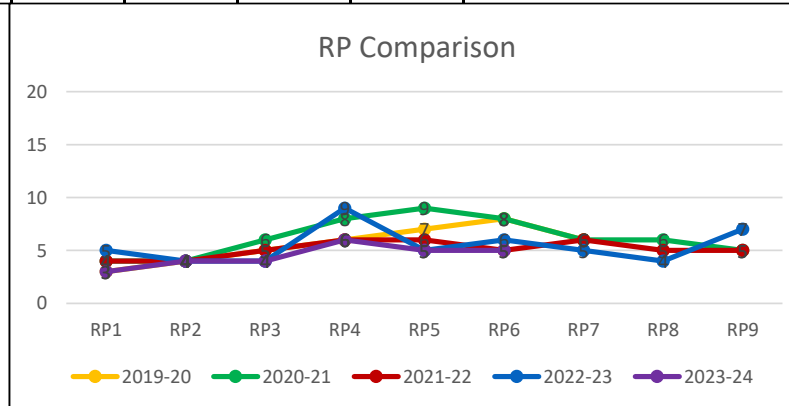
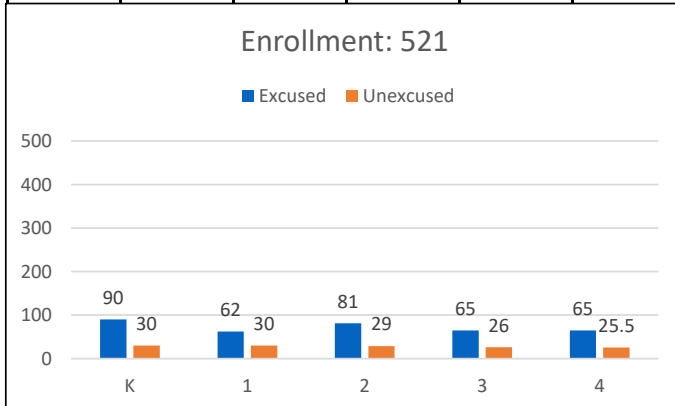
2019-20	RP1: 4%	RP2: 4%	RP3: 5%	RP4: 5.6%	RP5: 6%	RP6: 8.8%	RP7: 4.9%	Covid-19	Covid-19
2020-21	RP1: 7.3%	RP2: 5.8%	RP3: 8.1%	RP4: 11.6%	RP5: 9.9%	RP6: 7.5%	RP7: 5.3%	RP8: 8%	RP9: 5.4%
2021-22	RP1: 6.3%	RP2: 6.7%	RP3: 6.3%	RP4: 7.7%	RP5: 6.9%	RP6: 5.8%	RP7: 6.3%	RP8: 8%	RP9: 5.9%
2022-23	RP1: 4.9%	RP2: 4.4%	RP3: 5.5%	RP4: 11%	RP5: 4.7%	RP6: 6.1%	RP7: 4.8%	RP8: 4.9%	RP9: 4.9%
2023-24	RP1: 4.3%	RP2: 4.2%	RP3: 5%	RP4: 7%	RP5: 6.9%	RP6: 5.1%			

# Glenwood



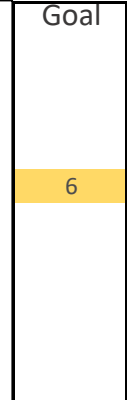
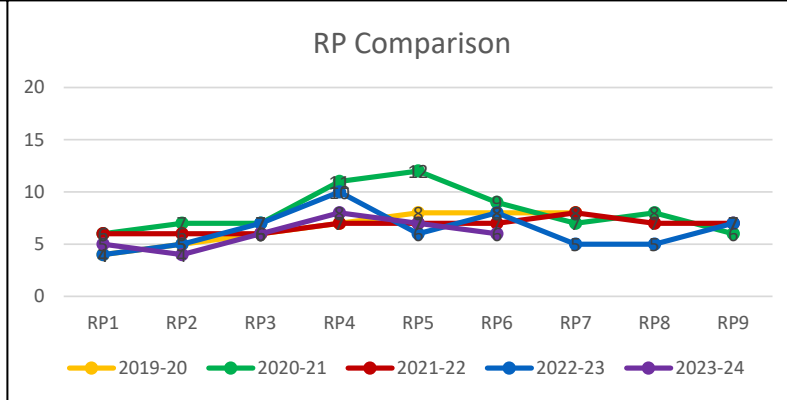
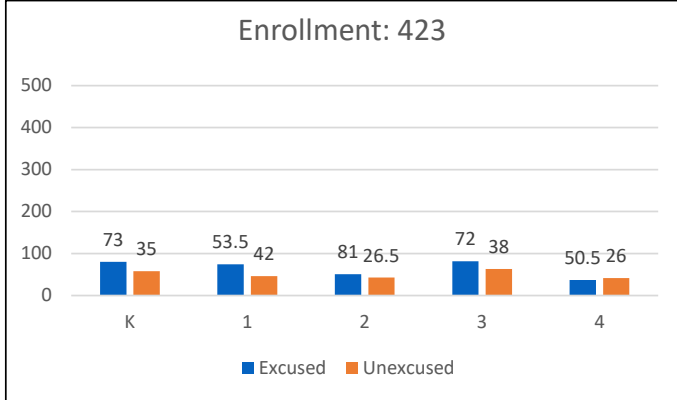
2019-20	RP1: 3%	RP2: 4%	RP3: 5%	RP4: 5.6%	RP5: 6.8%	RP6: 7.7%	RP7: 6.4%	Covid-19	Covid-19
2020-21	RP1: 4.3%	RP2: 4.3%	RP3: 6.1%	RP4: 7.7%	RP5: 9.1%	RP6: 7.9%	RP7: 6.2%	RP8: 5.6%	RP9: 5.3%
2021-22	RP1: 4.4%	RP2: 4.2%	RP3: 4.8%	RP4: 6.4%	RP5: 5.8%	RP6: 4.6%	RP7: 5.5%	RP8: 5.4%	RP9: 5%
2022-23	RP1: 3.2%	RP2: 4%	RP3: 4.4%	RP4: 8.9%	RP5: 5.4%	RP6: 5.8%	RP7: 4.5%	RP8: 4.1%	RP9: 7.1%
2023-24	RP1: 3.3%	RP2: 3.7%	RP3: 4.1%	RP4: 5.8%	RP5: 4.8%	RP6: 4.8%			

# Linden



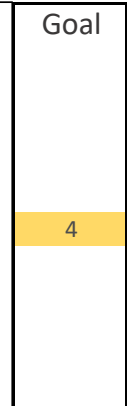
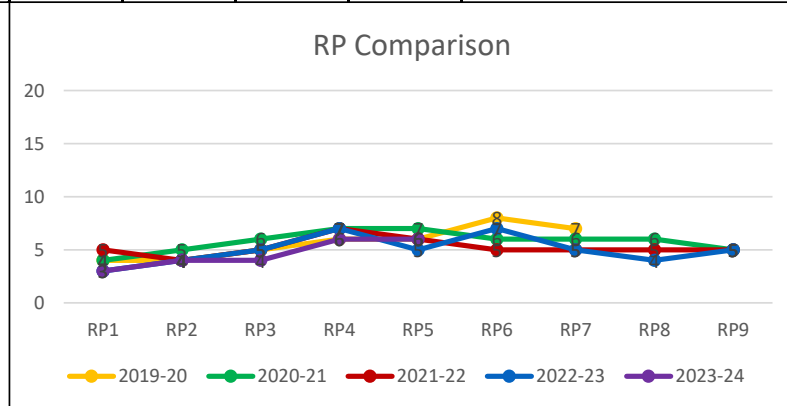
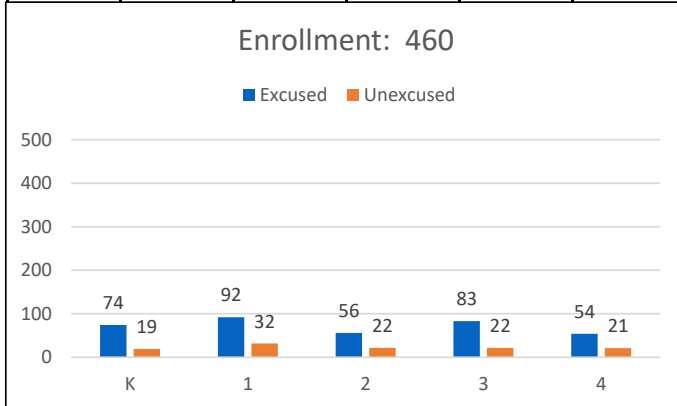
2019-20	RP1: 4%	RP2: 5%	RP3: 6%	RP4: 6.6%	RP5: 7.8%	RP6: 8.4%	RP7: 7.5%	Covid-19	Covid-19
2020-21	RP1: 6.1%	RP2: 7.1%	RP3: 7.3%	RP4: 11%	RP5: 11.7%	RP6: 8.9%	RP7: 6.9%	RP8: 7.5%	RP9: 6.4%
2021-22	RP1: 6.1%	RP2: 6%	RP3: 6.4%	RP4: 6.9%	RP5: 6.6%	RP6: 6.5%	RP7: 8%	RP8: 6.6%	RP9: 7.4%
2022-23	RP1: 3.6%	RP2: 4.7%	RP3: 7%	RP4: 10%	RP5: 6.4%	RP6: 8.1%	RP7: 5.3%	RP8: 5.3%	RP9: 6.9%
2023-24	RP1: 4.9%	RP2: 4.4%	RP3: 5.5%	RP4: 7.7%	RP5: 7%	RP6: 5.9%			

# Willow Brook



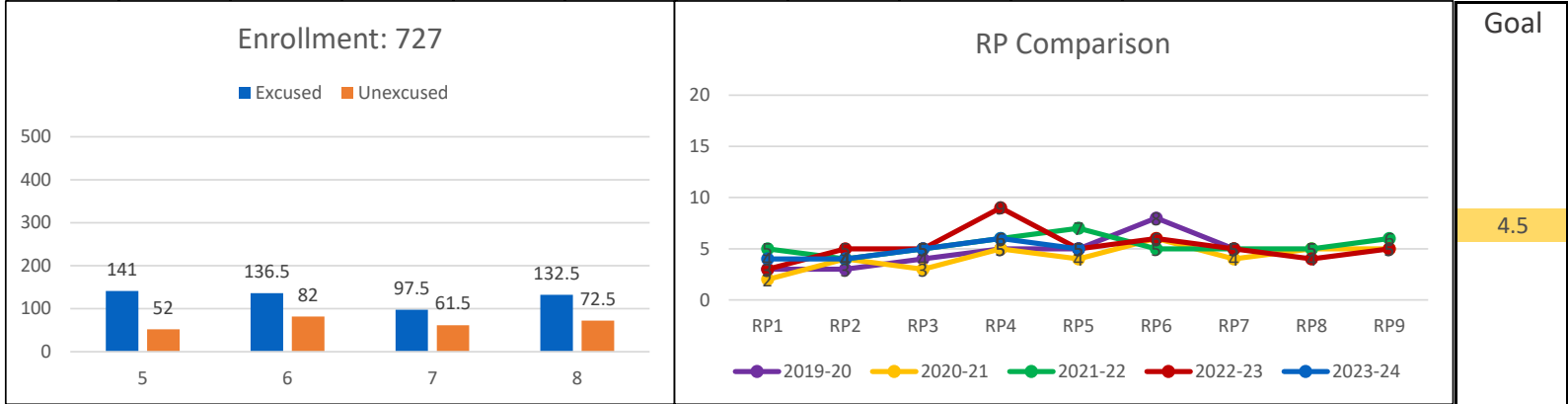
2019-20	RP1: 4%	RP2: 4%	RP3: 5%	RP4: 5.6%	RP5: 6.2%	RP6: 8.4%	RP7: 6.6%	Covid-19	Covid-19
2020-21	RP1: 4.1%	RP2: 4.9%	RP3: 6.2%	RP4: 7.1%	RP5: 7.1%	RP6: 5.9%	RP7: 5.5%	RP8: 5.9%	RP9: 5.3%
2021-22	RP1: 4.5%	RP2: 4.1%	RP3: 4.8%	RP4: 6.7%	RP5: 5.9%	RP6: 5%	RP7: 4.7%	RP8: 4.5%	RP9: 5.2%
2022-23	RP1: 2.6%	RP2: 3.7%	RP3: 5.2%	RP4: 6.6%	RP5: 4.5%	RP6: 6.7%	RP7: 5.4%	RP8: 3.7%	RP9: 4.9%
2023-24	RP1: 3.1%	RP2: 3.5%	RP3: 4.3%	RP4: 6.2%	RP5: 5.6%	RP6: 5.2%			

# Woodland



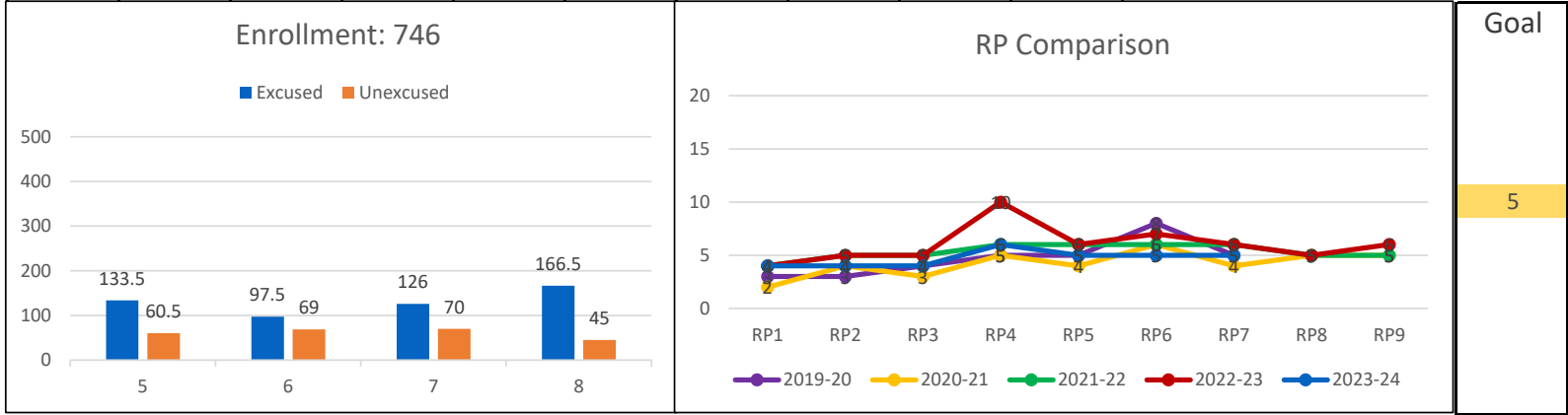
2019-20	RP1: 3%	RP2: 3%	RP3: 4%	RP4: 5%	RP5: 4.9%	RP6: 8.4%	RP7: 5.2%	Covid-19	Covid-19
2020-21	RP1: 2.2%	RP2: 4.1%	RP3: 3.4%	RP4: 4.5%	RP5: 3.8%	RP6: 5.7%	RP7: 3.7%	RP8: 5.1%	RP9: 4.7%
2021-22	RP1: 5.1%	RP2: 4.2%	RP3: 4.9%	RP4: 5.9%	RP5: 6.8%	RP6: 5.4%	RP7: 5.3%	RP8: 4.9%	RP9: 6.1%
2022-23	RP1: 3.1%	RP2: 4.6%	RP3: 5%	RP4: 8.7%	RP5: 4.7%	RP6: 5.5%	RP7: 5.1%	RP8: 4.3%	RP9: 5.3%
2023-24	RP1: 3.8%	RP2: 4.4%	RP3: 4.5%	RP4: 5.6%	RP5: 5.3%	RP6: 5.3%			

# Jefferson



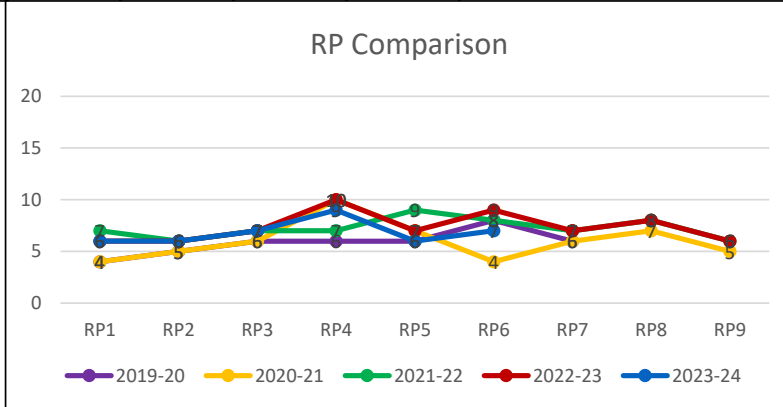
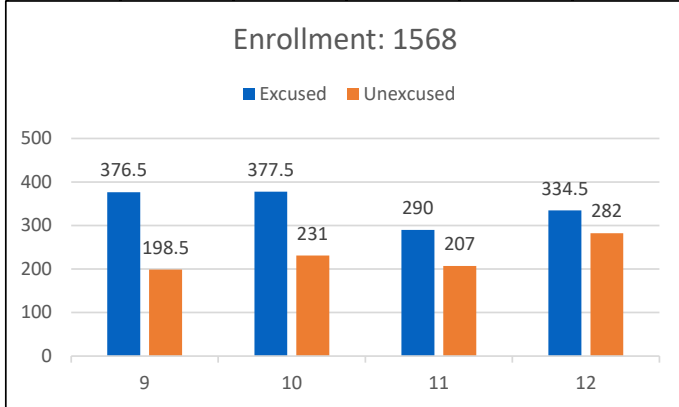
2019-20	RP1: 4%	RP2: 4%	RP3: 5%	RP4: 5.7%	RP5: 5.6%	RP6: 7.9%	RP7: 5.7%	Covid-19	Covid-19
2020-21	RP1: 2%	RP2: 2.3%	RP3: 3.4%	RP4: 4%	RP5: 2.7%	RP6: 3.3%	RP7: 2.8%	RP8: 5.6%	RP9: 5.1%
2021-22	RP1: 4.2%	RP2: 4.7%	RP3: 5.4%	RP4: 5.8%	RP5: 5.9%	RP6: 5.5%	RP7: 5.6%	RP8: 5%	RP9: 5.3%
2022-23	RP1: 4.4%	RP2: 4.5%	RP3: 5.4%	RP4: 9.7%	RP5: 6.1%	RP6: 6.8%	RP7: 5.5%	RP8: 4.8%	RP9: 5.8%
2023-24	RP1: 3.9%	RP2: 4.2%	RP3: 4.4%	RP4: 5.8%	RP5: 4.8%	RP6: 5.2%			

# Robertsville



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%	RP6: 8.7%	RP7: 6.5%	RP8: 8.2%	RP9: 6.3%
2023-24	RP1: 5.8%	RP2: 6.3%	RP3: 7.1%	RP4: 8.7%	RP5: 6.4%	RP6: 7.3%			

# ORHS



Goal
6

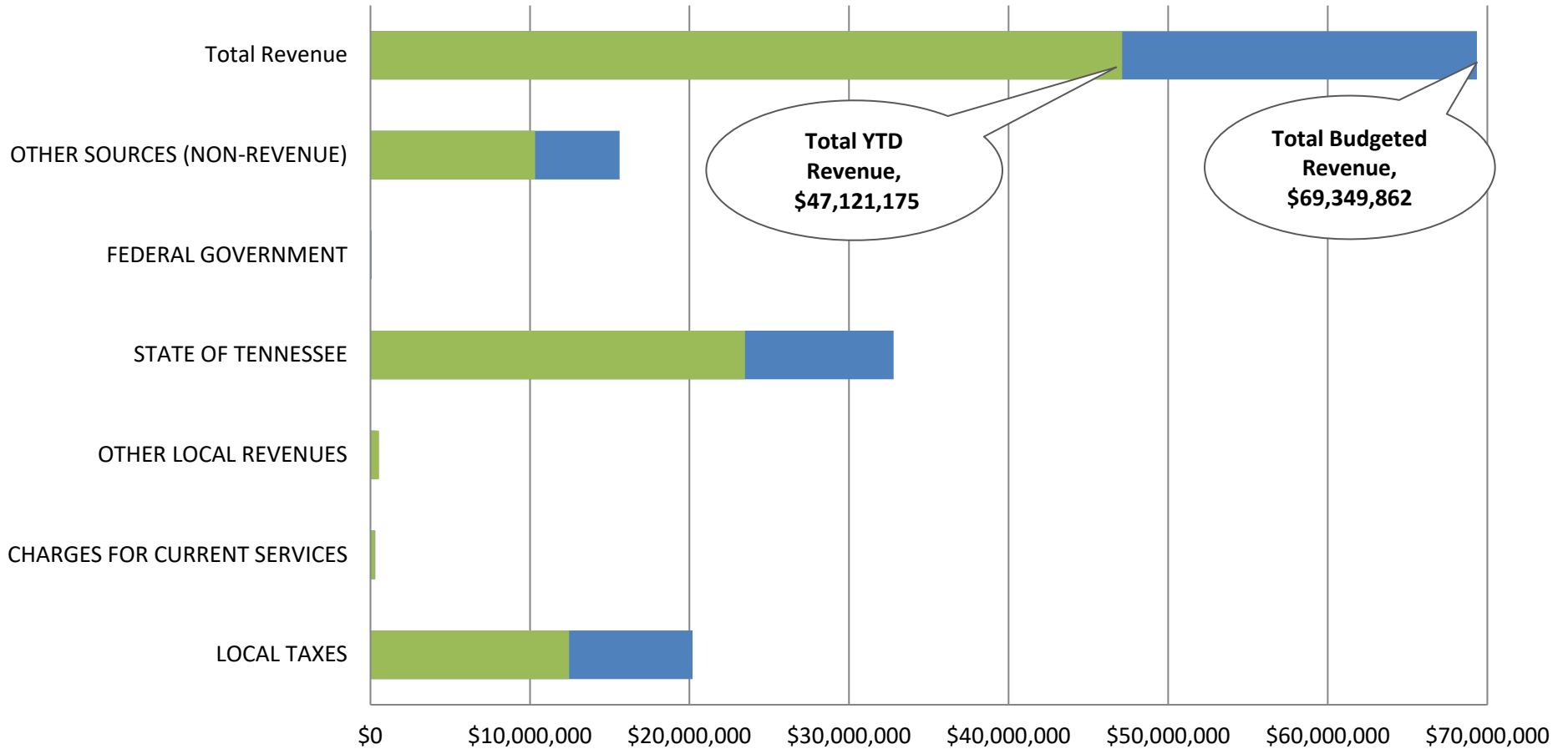
Acct	Acct	2023-24 FYTD Budget	February 2023-24 Monthly Activity	2023-24 Year-To-Date	2023-24 Percent of Budget	2023-24 Variance from Bud	Encumbered Amount	Unencumbered Budget Remaining
40110	Current Property Tax	12,993,941.00	3,033,564.46	7,089,334.32	54.56%	5,904,606.68		5,904,606.68
40210	Local Option Sales Tax	7,200,000.00	780,617.19	5,365,171.77	74.52%	1,834,828.23		1,834,828.23
40275	Mixed Drink Tax	125.00		215.28	172.22%	-90.28		-90.28
40280	Mineral Severance Tax	125.00				125.00		125.00
43511	Tuition - Regular Day Students	300,000.00	11,911.53	284,303.23	94.77%	15,696.77		15,696.77
43513	Tuition - Summer School			150.00		-150.00		-150.00
43533	Transportation Fees	3,000.00	495.00	2,080.00	69.33%	920.00		920.00
44110	Interest Earned	220,000.00	80,200.97	484,984.58	220.45%	-264,984.58		-264,984.58
44120	Lease/Rentals	10,000.00	-630.00	8,605.00	86.05%	1,395.00		1,395.00
44170	Miscellaneous Refunds	3,000.00		5,850.66	195.02%	-2,850.66		-2,850.66
44530	Sale of Equipment	20,000.00	8,293.00	20,100.52	100.50%	-100.52		-100.52
44570	Contributions & Gifts	40,082.66		2,800.00	6.99%	37,282.66		37,282.66
44990	Other Local Revenues	62,000.00	510.00	21,627.13	34.88%	40,372.87		40,372.87
46510	TN Investment in Student Achv	30,250,000.00	3,026,523.40	22,091,241.77	73.03%	8,158,758.23		8,158,758.23
46515	Early Childhood Education	553,297.65	42,013.33	231,508.55	41.84%	321,789.10		321,789.10
46610	Career Ladder Program	84,600.00		44,998.97	53.19%	39,601.03		39,601.03
46790	Other Vocational	1,191,172.15	15,186.84	987,265.35	82.88%	203,906.80		203,906.80
46980	Other State Grants	672,266.49	56,461.24	117,779.44	17.52%	554,487.05		554,487.05
46990	Other State Revenues	45,189.00				45,189.00		45,189.00
47630	Public Law 874 - Maint/Operat.			23,692.00		-23,692.00		-23,692.00
47640	ROTC Reimbursement	79,600.00		9,511.59	11.95%	70,088.41		70,088.41
49700	Insurance Recovery	2,500.00		535.00	21.40%	1,965.00		1,965.00
49800	Transfers In	125,000.00		111.24	0.09%	124,888.76		124,888.76
49810	City General Fund Transfer	15,493,963.00	1,291,163.58	10,329,308.64	66.67%	5,164,654.36		5,164,654.36
-----	Revenue	69,349,861.95	8,346,310.54	47,121,175.04	67.95%	22,228,686.91		22,228,686.91
=====								
71100	Regular Instruction Prgm	30,795,950.40	2,449,076.84	17,805,177.66	57.82%	12,990,772.74	11,766,831.68	1,223,941.06
71150	Alternative Instruction Prgm	970,766.00	79,673.03	533,792.75	54.99%	436,973.25	354,625.88	82,347.37
71200	Special Education Prgm	5,393,176.88	445,154.05	3,099,640.07	57.47%	2,293,536.81	2,098,026.75	195,510.06
71300	Career/Technical Education Prg	2,841,892.15	210,742.46	1,684,340.44	59.27%	1,157,551.71	794,725.44	362,826.27
71900	Contingency	560,451.40				560,451.40		560,451.40
72120	Health Services	738,520.00	65,820.73	462,859.79	62.67%	275,660.21	256,400.87	19,259.34
72130	Other Student Support	2,225,890.73	137,747.48	1,221,352.29	54.87%	1,004,538.44	650,026.35	354,512.09
72210	Regular Inst. Support	4,200,488.00	318,697.63	2,440,028.45	58.09%	1,760,459.55	1,260,821.18	499,638.37
72220	Special Education Support	991,925.00	75,310.55	573,869.52	57.85%	418,055.48	384,231.64	33,823.84
72230	Career & Technical Prg Support	258,348.00	25,901.92	148,059.37	57.31%	110,288.63	74,299.01	35,989.62
72250	Technology Services	3,178,119.96	493,833.83	2,120,373.38	66.72%	1,057,746.58	738,059.29	319,687.29
72260	Adult Programs		2,622.13	16,428.14		-16,428.14	10,488.42	-26,916.56

Acct	Acct	2023-24 FYTD Budget	February 2023-24 Monthly Activity	2023-24 Year-To-Date	2023-24 Percent of Budget	2023-24 Variance from Bud	2023-24 Encumbered Amount	Unencumbered Budget Remaining
72290	Communications	215,578.00	10,060.25	136,692.76	63.41%	78,885.24	41,719.42	37,165.82
72310	Board of Education	1,183,507.00	79,639.28	770,602.25	65.11%	412,904.75	492.27	412,412.48
72320	Director of Schools	408,770.00	30,989.17	260,877.25	63.82%	147,892.75	125,891.28	22,001.47
72410	Office of the Principal	4,393,702.67	366,835.74	2,894,022.81	65.87%	1,499,679.86	1,447,113.32	52,566.54
72510	Fiscal Services	1,029,454.00	79,607.98	676,517.83	65.72%	352,936.17	313,120.32	39,815.85
72520	Human Resources/ Personnel	478,093.00	35,021.95	321,609.77	67.27%	156,483.23	133,902.01	22,581.22
72610	Operation of Plant	4,885,262.00	394,446.94	3,055,788.91	62.55%	1,829,473.09	882,706.25	946,766.84
72620	Maintenance of Plant	2,520,313.98	156,656.92	1,664,913.09	66.06%	855,400.89	577,390.57	278,010.32
72710	Transportation	1,978,790.00	102,722.31	971,836.61	49.11%	1,006,953.39		1,006,953.39
73400	Early Childhood Education	455,414.20	42,514.01	264,623.77	58.11%	190,790.43	185,679.33	5,111.10
73401	Pre-K General Fund	814,892.00	71,562.47	513,958.81	63.07%	300,933.19	227,592.72	73,340.47
76100	Regular Capital Outlay	2,541,203.58	21,944.43	1,572,726.92	61.89%	968,476.66	537,383.30	431,093.36
82130	Education Principal on Debt	6,843.00		6,843.00	100.00%			
82230	Education Interest on Debt	157.00		157.00	100.00%			
99100	Transfers Out	122,471.00				122,471.00		122,471.00
-----	Expense	73,189,979.95	5,696,582.10	43,217,092.64	59.05%	29,972,887.31	22,861,527.30	7,111,360.01
-----	General Purpose School Fund	-3,840,118.00	2,649,728.44	3,904,082.40	63.38%	-7,744,200.40	-22,861,527.30	15,117,326.90
Grand Revenue Totals		69,349,861.95	8,346,310.54	47,121,175.04	67.95%	22,228,686.91		22,228,686.91
Grand Expense Totals		73,189,979.95	5,696,582.10	43,217,092.64	59.05%	29,972,887.31	22,861,527.30	7,111,360.01
Grand Totals		3,840,118.00	2,649,728.44	3,904,082.40	-101.67%	7,744,200.40	22,861,527.30	15,117,326.90
		Loss	Profit	Profit		Loss	Loss	Profit

Number of Accounts: 1352

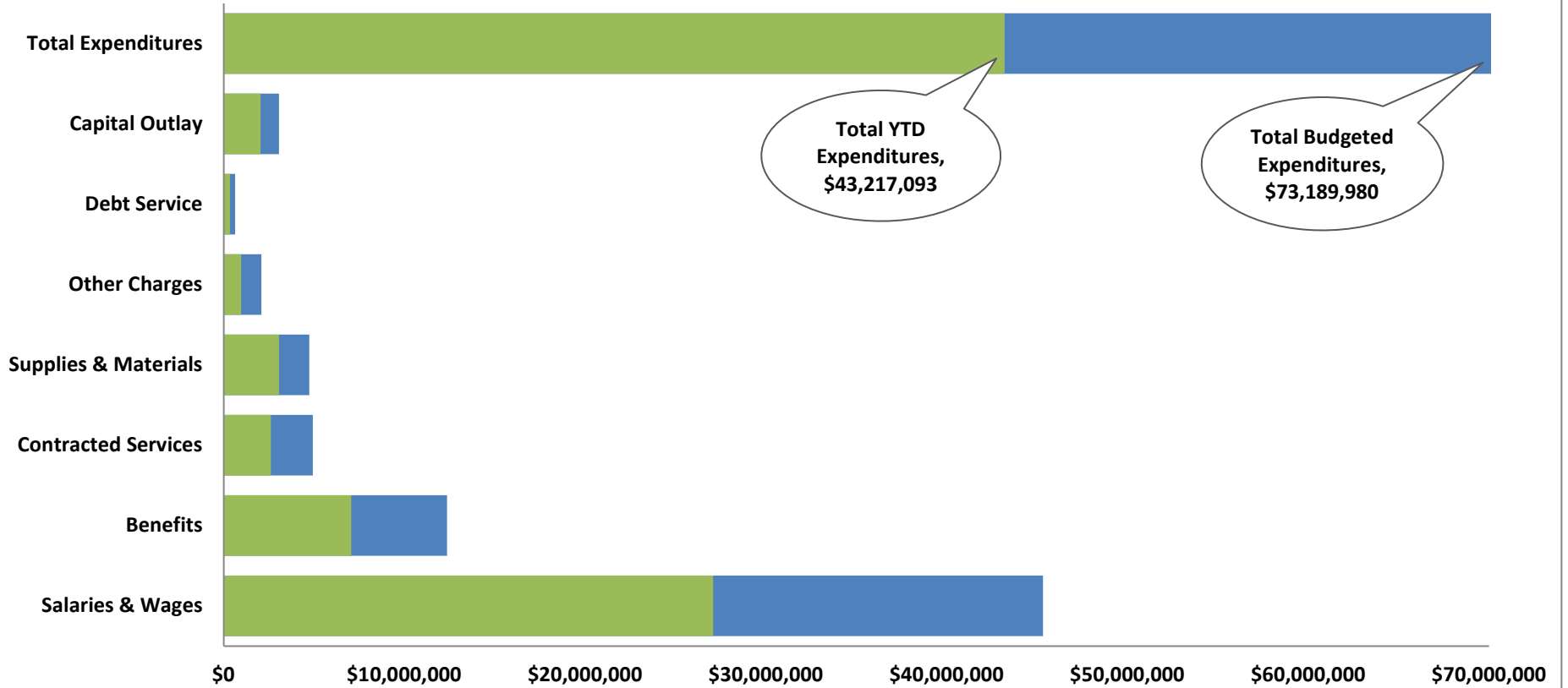
\*\*\*\*\* End of report \*\*\*\*\*

## General Fund Revenue Budget to Actual Summary - February, 2024



	LOCAL TAXES	CHARGES FOR CURRENT SERVICES	OTHER LOCAL REVENUES	STATE OF TENNESSEE	FEDERAL GOVERNMENT	OTHER SOURCES (NON-REVENUE)	Total Revenue
<b>Percent of Budget</b>	61.67%	94.57%	153.19%	71.57%	41.71%	66.13%	67.95%
<b>Year-To-Date</b>	12,454,721.37	286,533.23	543,967.89	23,472,794.08	33,203.59	10,329,954.88	\$47,121,175
<b>FYTD Budget</b>	20,194,191.00	303,000.00	355,082.66	32,796,525.29	79,600.00	15,621,463.00	\$69,349,862

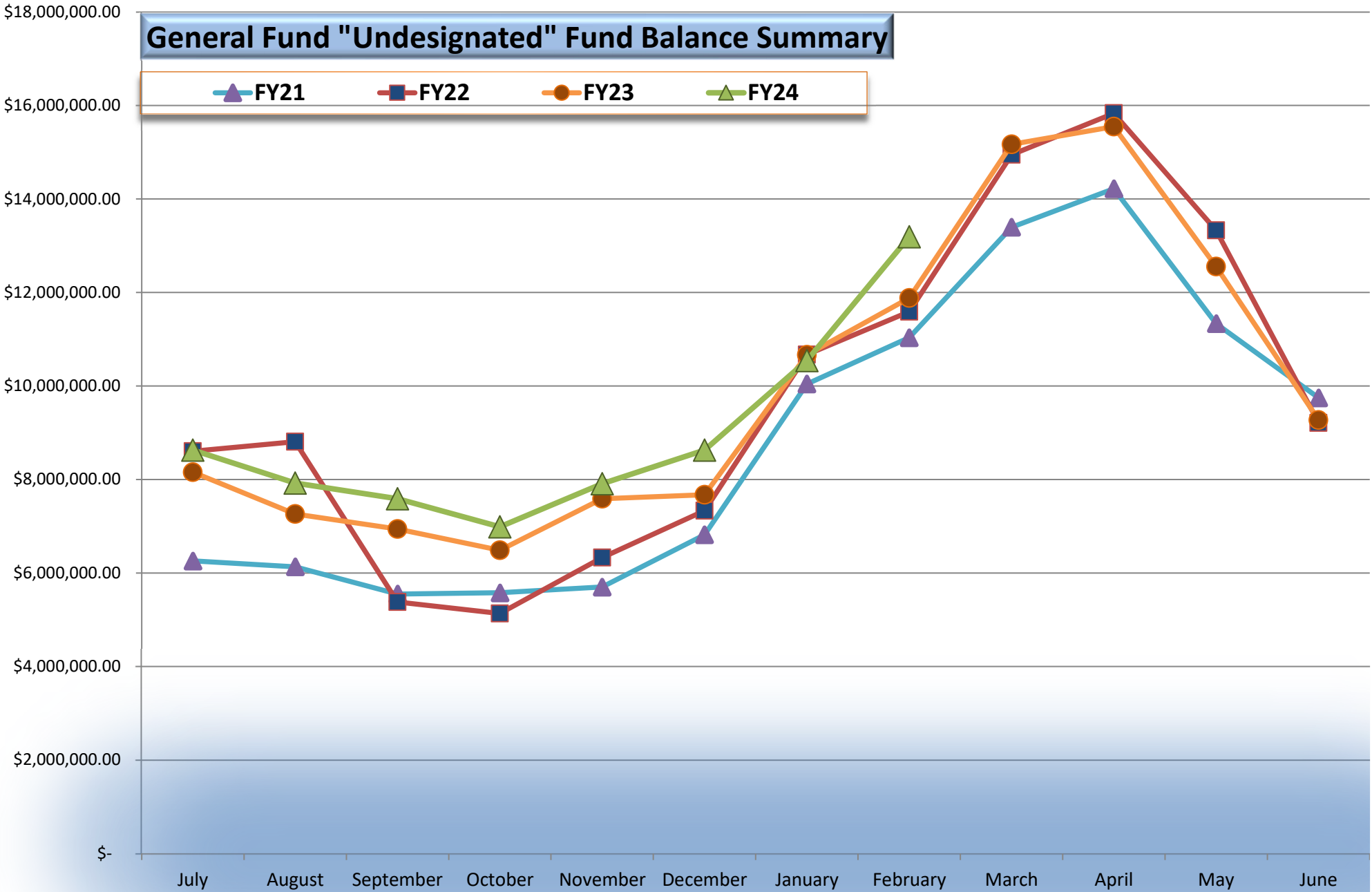
## General Fund Expenditure Budget to Actual Summary by Object February, 2024



	Salaries & Wages	Benefits	Contracted Services	Supplies & Materials	Other Charges	Debt Service	Capital Outlay	Total Expenditures
<b>FYTD %</b>	60.08%	57.77%	52.54%	64.75%	40.9%	55.42%	65.42%	59.05%
<b>FYTD Activity</b>	27,081,870.72	7,060,473.09	2,623,978.04	3,072,093.74	975,483.04	357,000.00	2,046,194.01	\$43,217,093
<b>FYTD Revised Bdg</b>	45,337,916.28	12,371,564.87	4,933,318.69	4,742,445.40	2,092,675.40	644,205.00	3,067,854.31	\$73,189,980

# General Fund "Undesignated" Fund Balance Summary

FY21 FY22 FY23 FY24



Acct	Acct	2023-24 FYTD Budget	February 2023-24 Monthly Activity	2023-24 Year-To-Date	2023-24 Percent of Budget	2023-24 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
142	School Federal Projects							
R	Revenue							
47131	Vocational Program Improvement	75,299.54	2,304.76	47,992.65	63.74%	27,306.89		27,306.89
47141	Title I	1,018,977.64	74,685.24	436,829.58	42.87%	582,148.06		582,148.06
47143	Special Education Grants	1,479,520.40	107,928.63	645,602.72	43.64%	833,917.68		833,917.68
47145	Special Ed Pre-School Grants	47,613.63		10,411.26	21.87%	37,202.37		37,202.37
47146	English Lang Acq Grants	32,739.63	3,340.31	12,842.59	39.23%	19,897.04		19,897.04
47147	Title IV Part B, 21st Century	152,625.00	1,759.74	52,047.35	34.10%	100,577.65		100,577.65
47189	Title II	196,176.13	7,135.80	58,060.54	29.60%	138,115.59		138,115.59
47307	COVID-19 Grant B	73,250.00		6,500.00	8.87%	66,750.00		66,750.00
47309	COVID-19 Grant D	103,000.00	18,200.00	42,891.10	41.64%	60,108.90		60,108.90
47310	COVID-19 Grant E	14,883.63		14,883.63	100.00%			
47401	ESSER 3.0	2,198,231.35	75,078.53	1,423,578.28	64.76%	774,653.07		774,653.07
47404	ARP Homeless Grant	45,518.53		5,854.36	12.86%	39,664.17		39,664.17
47590	Other Federal Through State	517,356.40	79,522.41	183,663.09	35.50%	333,693.31		333,693.31
47710	Public Safety Prtnrshp & Comm	373,217.00	4,781.76	373,217.00	100.00%			
47990	Other Direct Fedral Revenue	1,181,154.79	101,337.26	572,048.30	48.43%	609,106.49		609,106.49
-----	Revenue	7,509,563.67	476,074.44	3,886,422.45	51.75%	3,623,141.22		3,623,141.22
E	Expense							
71100	Regular Instruction Prgm	1,459,700.25	60,078.68	1,121,881.47	76.86%	337,818.78	265,625.87	72,192.91
71200	Special Education Prgm	1,148,682.88	84,962.07	590,181.05	51.38%	558,501.83	366,376.85	192,124.98
71300	Career/Technical Education Prgm	65,547.12	2,304.76	55,123.03	84.10%	10,424.09	9,218.94	1,205.15
72120	Health Services	39,135.69	9,428.72	12,630.29	32.27%	26,505.40	11,940.08	14,565.32
72130	Other Student Support	1,410,774.27	22,690.78	584,323.50	41.42%	826,450.77	407,771.66	418,679.11
72210	Regular Inst. Support	1,073,189.35	56,023.67	558,475.74	52.04%	514,713.61	113,333.52	401,380.09
72220	Special Education Support	358,392.70	28,412.97	218,067.30	60.85%	140,325.40	120,575.01	19,750.39
72230	Career & Technical Prg Support	2,150.00	161.93	816.08	37.96%	1,333.92	408.03	925.89
72250	Technology Services	18,000.00	1,263.94	10,791.58	59.95%	7,208.42		7,208.42
72710	Transportation	19,382.23		9,634.69	49.71%	9,747.54		9,747.54
73100	Food Service			100.00		-100.00	1,000.00	-1,100.00
73300	Community Services	1,324,807.01	101,915.41	729,840.78	55.09%	594,966.23	335,264.36	259,701.87
76100	Regular Capital Outlay	373,217.00		373,217.00	100.00%			
99100	Transfers Out	216,585.17		111.24	0.05%	216,473.93		216,473.93
-----	Expense	7,509,563.67	367,242.93	4,265,193.75	56.80%	3,244,369.92	1,631,514.32	1,612,855.60



Acct	Acct	2023-24 FYTD Budget	February 2023-24 Monthly Activity	2023-24 Year-To-Date	2023-24 Percent of Budget	2023-24 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
145	Other Education Funds							
R	Revenue							
44990	Other Local Revenues	35,000.00	650.00	16,952.75	48.44%	18,047.25		18,047.25
49800	Transfers In	120,021.00				120,021.00		120,021.00
-----	Revenue	155,021.00	650.00	16,952.75	10.94%	138,068.25		138,068.25
E	Expense							
73300	Community Services	155,021.00	13,021.12	92,378.36	59.59%	62,642.64	1,140.00	61,502.64
-----	Expense	155,021.00	13,021.12	92,378.36	59.59%	62,642.64	1,140.00	61,502.64
-----	Other Education Funds		-12,371.12	-75,425.61	35.26%	75,425.61	-1,140.00	76,565.61
=====								
146	Extended School Program							
R	Revenue							
43581	Community Services Fees Child	446,100.00	50,078.61	360,725.66	80.86%	85,374.34		85,374.34
-----	Revenue	446,100.00	50,078.61	360,725.66	80.86%	85,374.34		85,374.34
E	Expense							
73300	Community Services	438,337.00	28,291.48	247,194.49	56.39%	191,142.51	110,946.15	80,196.36
99100	Transfers Out	10,000.00				10,000.00		10,000.00
-----	Expense	448,337.00	28,291.48	247,194.49	55.14%	201,142.51	110,946.15	90,196.36
-----	Extended School Program	-2,237.00	21,787.13	113,531.17	67.97%	-115,768.17	-110,946.15	-4,822.02
=====								

<u>Acct</u>	<u>Acct</u>	<u>2023-24</u>	<u>February 2023-24</u>	<u>2023-24</u>	<u>2023-24</u>	<u>2023-24</u>	<u>Encumbered</u>	<u>Unencumbered</u>
		<u>FYTD Budget</u>	<u>Monthly Activity</u>	<u>Year-To-Date</u>	<u>Percent of Budget</u>	<u>Variance from Bud</u>	<u>Amount</u>	<u>Balance Remaining</u>
	Grand Revenue Totals	10,614,978.67	584,357.83	5,506,778.54	51.88%	5,108,200.13		5,108,200.13
	Grand Expense Totals	11,117,215.67	593,369.37	6,121,959.84	55.07%	4,995,255.83	1,896,156.81	3,099,099.02
	Grand Totals	502,237.00	9,011.54	615,181.30	122.49%	112,944.30	1,896,156.81	2,009,101.11
		Loss	Loss	Loss		Profit	Loss	Profit

Number of Accounts: 433

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

## Combined Fund Balance and YTD Operating Statement Summary

**February, 2024**

Description	General Fund 141	Federal Fund 142	Food Service Fund 143	Special Fund 145	ECC Fund 146
<b>Beginning Fund Balance July 1, 2023</b>	16,158,657.76	0.00	2,070,826.26	29,790.62	223,533.17
Plus YTD Revenue per books 2/29/24	47,121,175.04	3,886,422.45	1,242,677.68	16,952.75	360,725.66
Less YTD Expenditures per books 2/29/24	(43,217,092.64)	(4,265,193.75)	(1,517,193.24)	(92,378.36)	(247,194.49)
<b>Revenues Over (Under) Expenditures as of 2/29/24</b>	<b>3,904,082.40</b>	<b>(378,771.30)</b>	<b>(274,515.56)</b>	<b>(75,425.61)</b>	<b>113,531.17</b>
<b>Ending Fund Balance per books as of 2/29/24</b>	<b>20,062,740.16</b>	<b>(378,771.30)</b>	<b>1,796,310.70</b>	<b>(45,634.99)</b>	<b>337,064.34</b>

### Fund Balance Restricted/Committed/Assigned Status

Encumbrances and Deferred Revenue	\$ -		\$ 76,772.80		
Inventory					
Restricted for Career Ladder Program	-942.34				
Restricted for Operation of Non-Instructional Services (CCI)	16,200.00		1,219,537.90		337,064.34
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	3,125.85				
Assigned for other local grants					
Assigned for Instruction - Education Foundation Grant	4,048.73				
Assigned for Instruction (APSI-ORHS)	8,224.41				
Assigned for Support Services FRC Local Funds (56)				-45,634.99	
Nonspendable-Prepaid Expenditures					
<b>Assigned to Balance FY24 Budget</b>	<b>3,840,118.00</b>	<b>0.00</b>	<b>500,000.00</b>		
<b>Unassigned Fund Balance 2/29/24</b>	<b>\$ 13,191,965.51</b>	<b>-387,771.30</b>	<b>0.00</b>	<b>0.00</b>	
<b>Total Fund Balance 2/29/24</b>	<b>\$ 20,062,740.16</b>	<b>\$ (387,771.30)</b>	<b>\$ 1,796,310.70</b>	<b>(\$45,634.99)</b>	<b>\$ 337,064.34</b>