

Regular Board of Education Meeting

June 17, 2024 5:00 PM

Robert J. Smallridge School Administration Building

I. Call to Order

II. Pledge of Allegiance and Presentation of Colors

III. Approval of Agenda

IV. Special Reports/Presentations

A. Good News

B. Retirement Recognition of SRO Mike Swigert

C. Blue Ribbon Presentation to Linden Elementary School by Mr. Bob Eby

V. Public Forum

VI. Consent Agenda

A. Board Minutes 05-20-24

VII. Items for Action

A. FY24 Budget Transfer #3 - Second Reading

B. FY24 Budget Transfer #4 - First & Second Reading

C. FY24 BOE Audit Contract

D. FY24 Fiscal Pre-Monitoring Supports Grant

E. FY25 Federal Projects Budget Resolution

F. FY25 Board of Education Annual Agenda

G. FY25 District Paper Purchase

H. FY25 Food Service Contract Renewal

I. FY25 Oak Ridge Schools Student Discipline Code of Conduct

J. Board Policy 1.800 School Calendar - First and Second Reading

K. Board Policy 3.202 Emergency Preparedness Plan - First and Second Reading

L. Board Policy 3.205 Security - First and Second Reading

M. Board Policy 5.307 Physical Assault Leave - First and Second Reading

N. Purchase of Replacement Boiler System at Robertsville Middle School

O. Purchase of i-Pads for K-1 Refresh

P. ORHS Basketball Field Trip to Winston-Salem, NC

Q. ORHS Cheerleader Field Trip to Johnson City, TN

R. ORHS Volleyball Field Trip to Lexington, KY

VIII. Items for Information

A. Enrollment and Attendance Reports

B. Financial Report - May 2024

IX. Items for Discussion

X. Old Business

XI. New Business

XII. Communications

XIII. Adjournment



Willow Brook

Eighteen Safety Patrol students from WBES, along with two adults, joined other ORS elementary safety patrol programs on a trip to Washington DC. It was an amazing experience for the students as they got to visit national monuments and memorials and travel out of state for the first time without their families. The students from Willow Brook and Oak Ridge schools represented themselves excellently! A big thank you to the Board of Education, our sponsors, Mr. Nussbaum, and all the chaperones for making this memorable trip possible!

Willow Brook is excited to host the Summer Learning Camp taking place this summer! We are thrilled to report our camp began with 67 students on the first day, despite some students having prescheduled absences. A huge shout out to Mrs. O'Kert, Mrs. Tan, and Dr. Collins for their outstanding work with SLC!

A team of six educators from Willow Brook will be traveling to the NIET Summer School in Scottsdale, Arizona this week! They will be sharing their knowledge and experiences in professional development when staff return in July.

Michelle Chenot, a first-grade teacher, was selected to participate in the Niswonger Foundation West Externship. Alongside 20 other local teachers, she engaged in a valuable learning opportunity at the Anderson County Career and Technical Center. Mrs. Chenot will share her experience with staff in July. Her key learnings emphasized the significance of safety, teamwork, communication, and problem-solving which are the most important aspects of the job.

Dr. Tiffany Collins was chosen to be the 2024-25 Innovation Coach for Willow Brook and Linden Elementary Schools. We are excited to see the impact this position will have on integrating STEM practices into the classroom!

Robertsville Middle School

Robertsville Middle School had their first ever promotion ceremony for 8th grade students as a culminating event to their Capstone work this school year. Throughout this academic year, students immersed themselves in career exploration and extensive planning to prepare themselves for their transition to Oak Ridge High School and their future. It was an exciting day to celebrate our students and their achievements while at RMS.

Good News



June 17, 2024

Oak Ridge High School

The Oak Ridge High School Baseball team had a remarkable season this year. The Wildcats achieved a significant milestone by making it to the State Tournament for the first time in 52 years! Competing in Murfreesboro, they participated in three games and proudly secured a Top 6 position in the state. Their outstanding record of 28-16-1 marks the highest number of wins ever achieved by any ORHS baseball team. Congratulations to Coach Travis Free, his dedicated staff, and all the players for their exceptional performance this season.

Congratulations to Mason Greenhalgh, our first track state champion since 2012. Despite the pouring rain, Mason won the 800m with a time of 1:57:09 seconds. He maintained the lead throughout every step of the race.



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 #3**
Date: May 20, 2024

The attached FY'24 Budget Transfer #3 includes the following budget requests for Board of Education approval:

- End of year realignment of general fund expense accounts due to building and departmental needs. This includes funds for furniture purchases, student device cases, and multiple Maintenance projects.
- End of year realignment of cafeteria fund expense accounts due to program needs.
- Adjustment of grant budgets due to allocation changes and program needs.
- Establish Summer Learning Camp & Summer Learning Transportation grant budgets.
- All routine budget transfers and revisions from February 14, 2024 through May 15, 2024

FY 24 FYTD Budget Summary - Budget Transfer #1,#2,#3 & Amendment #1,#2, #3

Fund	FY24 Original Approved Budget	Budget Amendment #1, #2, & #3	Budget Transfer #1, #2, & #3	FY24 Revised & Amended Budget Amounts
Fund 141 (General Fund)	\$ 72,537,161.00	\$ 1,022,172.15	\$ (183,388.37)	\$ 73,375,944.78
Fund 142 (Federal)	\$ 5,087,614.00	\$ 2,277,596.47	\$ 183,388.37	\$ 7,548,598.84
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
TOTAL All Funds	\$ 81,232,427.00	\$ 3,299,768.62	\$ -	\$ 84,532,195.62

Fund 141 Budget Transfers

Fund 141 REVENUES	Account Number	Decrease	Increase
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Establish CRESO Grant Budget (To 142)	141 R 46980 000 000 00000 000	\$ 36,307.42	\$ -
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Establish Budget for Weather Damage - from Contingency	141 R 44570 000 000 00000 000	\$ 27,173.66	\$ -
	141 R 46980 000 000 00000 000	\$ 17,756.34	\$ -
	141 R 49700 000 000 00000 000	\$ -	\$ 44,930.00

Establish OREF Grant Budgets - from Contingency	141 R 46980 000 000 00000 000	\$ 50,398.48	\$ -
	141 R 44570 000 000 00000 100	\$ -	\$ 50,398.48

Establish Summer Learning Camps Grant - from Contingency	141 R 46980 000 000 00000 000	\$ 511,090.83	\$ -
	141 R 46590 000 098 0000 120	\$ -	\$ 511,090.83

Establish Summer Learning Transportation Grant - from Contingency	141 R 46980 000 000 00000 000	\$ 20,411.76	\$ -
	141 R 49800 000 000 00000000	\$ 72,286.08	
	141 R 46590 000 098 0000 123	\$ -	\$ 92,697.84

Adjust IDEA-B Allocation to Match ePlan - Increased Allocation (To 142)	141 R 46980 000 000 00000 000	\$ 39,035.17	\$ -
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Fund 141 EXPENDITURES	Account Number	Increase	Decrease
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Establish CRESO Grant Budget (to Fund 142)	141 E 71900 599 000 00000 000	\$ -	\$ 36,307.42
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Adjust ISM Grant to Match ePlan	141 E 71300 730 023 00040 000	\$ -	\$ 10,000.00
	141 E 71300 429 023 00040 000	\$ 10,000.00	\$ -

Transfer for JMS Security & Furniture Needs	141 E 72210 524 000 00025 000	\$ -	\$ 5,279.60
	141 E 71100 711 000 00025 000	\$ 5,279.60	\$ -
Transfer for WB Professional Development	141 E 72210 196 000 00045 000	\$ -	\$ 2,964.60
	141 E 72210 524 000 00045 000	\$ 2,964.60	\$ -
Adjust ISM Grant to Match ePlan	141 E 71300 429 023 00025 000	\$ -	\$ 2,650.00
	141 E 71300 499 023 00025 000	\$ 2,650.00	\$ -
Establish Budget for Weather Damage - from Contingency	141 E 72610 399 000 0000 000	\$ 44,930.00	\$ -
	141 E 71900 599 000 00000 002	\$ -	\$ 44,930.00
Transfer for JMS Security Cameras	141 E 72610 720 000 00000 450	\$ 9,332.91	\$ -
	141 E 71100 711 000 00025 000	\$ -	\$ 9,332.91
Transfer for JMS Guidance Furniture	141 E 71100 429 000 00025 000	\$ -	\$ 1,363.21
	141 E 72410 701 000 00025 000	\$ 1,728.16	\$ -
	141 E 71100 711 000 00025 000	\$ -	\$ 364.95
Establish OREF Grant Budgets - from Contingency	141 E 72130 599 000 00015 100	\$ 4,000.00	\$ -
	141 E 72130 599 000 00030 100	\$ 9,095.92	\$ -
	141 E 72130 599 000 00035 100	\$ 8,445.00	\$ -
	141 E 72130 599 000 00040 100	\$ 3,336.00	\$ -
	141 E 72130 599 000 00040 100	\$ 9,000.85	\$ -
	141 E 72130 599 000 00040 100	\$ 7,746.00	\$ -
	141 E 72130 599 000 00045 100	\$ 120.00	\$ -
	141 E 72130 599 000 00045 100	\$ 414.51	\$ -
	141 E 72130 599 000 00045 100	\$ 915.90	\$ -
	141 E 72130 599 000 00045 100	\$ 4,030.00	\$ -
	141 E 72130 599 000 00045 100	\$ 1,200.00	\$ -
	141 E 72130 599 000 00050 100	\$ 2,094.30	\$ -
	141 E 71900 599 000 00000 000	\$ -	\$ 50,398.48

Transfer for Plant Operation Needs	141 E 72610 359 000 00000 000	\$ -	\$ 13,000.00
	141 E 72610 720 000 00000 000	\$ 4,000.00	\$ -
	141 E 72620 399 000 00000 000	\$ 9,000.00	\$ -

Transfer for Fence & Kai Vac	141 E 72610 454 000 00000 000	\$ -	\$ 6,000.00
	141 E 76100 724 000 00000 000	\$ 5,000.00	\$ -
	141 E 72610 720 000 00000 000	\$ 1,000.00	\$ -

Transfer for Machinery/Parts	141 E 72610 454 000 00000 000	\$ -	\$ 22,000.00
	141 E 72620 418 000 00000 000	\$ 7,000.00	\$ -
	141 E 72610 399 000 00000 000	\$ 15,000.00	\$ -

Transfer for Misting Columns	141 E 72610 454 000 00000 000	\$ -	\$ 8,660.00
	141 E 76100 724 000 00000 000	\$ 8,660.00	\$ -

Transfer for Linden Floor	141 E 72610 434 000 00000 000	\$ -	\$ 10,000.00
	141 E 72620 335 000 00000 000	\$ 10,000.00	\$ -

Transfer for IT Equipment Needs	141 E 72210 499 000 00000 000	\$ -	\$ 15,800.00
	141 E 72250 709 000 00000 000	\$ 15,800.00	\$ -

Adjust SPED Pre-K Grant Budget to Match ePlan	141 E 71200 116 010 000043 000	\$ -	\$ 500.00
	141 E 71200 116 010 00043 000	\$ -	\$ 3,000.00
	141 E 71200 725 010 00043 000	\$ 3,000.00	\$ -
	141 E 71200 116 010 00043 000	\$ -	\$ 2,000.00
	141 E 71200 471 010 00043 000	\$ 2,000.00	\$ -
	141 E 71200 208 010 00043 000	\$ 250.00	\$ -
	141 E 71200 217 010 00043 000	\$ 250.00	\$ -

Adjust ISM Grant to Match ePlan	141 E 71300 429 023 00025 000	\$ 8,000.00	\$ -
	141 E 71300 730 023 00025 000	\$ -	\$ 8,000.00

Adjust Pre-K Grant to Match ePlan	141 E 73400 116 011 00043 000	\$ -	\$ 300.00
	141 E 73400 217 011 00043 000	\$ 300.00	\$ -

Transfer for Student Device Cases	141 E 72250 187 000 00000 000	\$ -	\$ 6,600.00
	141 E 72250 307 000 00000 000	\$ -	\$ 9,600.00
	141 E 71100 722 000 00000 226	\$ 16,200.00	\$ -

Transfer for Student Device Cases	141 E 72130 322 000 00000 000	\$ -	\$ 26,250.00
	141 E 71100 722 000 00000 226	\$ 26,250.00	\$ -

RMS Transfers for Equipment & Furniture	141 E 71100 449 000 00040 000	\$ -	\$ 2,424.00
	141 E 72210 196 000 00040 000	\$ -	\$ 6,000.00
	141 E 72210 524 000 00040 000	\$ -	\$ 4,876.84
	141 E 72410 499 000 00040 000	\$ -	\$ 1,197.11
	141 E 72120 499 000 00040 000	\$ -	\$ 12.79
	141 E 71100 429 000 00040 000	\$ -	\$ 1,884.03
	141 E 72410 701 000 00040 000	\$ 1,793.93	\$ -
	141 E 71100 711 000 00040 000	\$ 1,300.00	\$ -
	141 E 72210 499 000 00040 302	\$ -	\$ 12.14
	141 E 72410 499 000 00040 000	\$ -	\$ 3,000.00
	141 E 71100 429 000 00040 000	\$ -	\$ 5,000.00
	141 E 72410 701 000 00040 000	\$ 2,000.00	\$ -
	141 E 71100 711 000 00040 000	\$ 19,312.98	\$ -

Establish Budget for Salary Study - from Contingency	141 E 72310 399 000 00000 000	\$ 8,360.00	\$ -
	141 E 71900 599 000 00000 000	\$ -	\$ 8,360.00

Transfer for Construction Materials	141 E 72610 399 000 00000 000	\$ -	\$ 35,000.00
	141 E 72620 426 000 00000 000	\$ 30,000.00	\$ -
	141 E 72620 335 000 00000 000	\$ 5,000.00	\$ -

Adjust IDEA-B Allocation to Match ePlan - Increased Allocation (To 142)	141 E 71900 599 000 00000 000	\$ -	\$ 39,035.17
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	141 E 71200 217 000 00000 000	\$	400.00	\$	-
	141 E 71200 204 000 00000 000	\$	-	\$	400.00
	141 E 71300 206 000 00000 000	\$	30.00	\$	-
	141 E 71300 207 000 00000 000	\$	-	\$	30.00
	141 E 72120 208 000 00000 000	\$	326.00	\$	-
	141 E 72120 204 000 00000 000	\$	-	\$	326.00
	141 E 72120 299 000 00000 000	\$	106.00	\$	-
	141 E 72120 207 000 00000 000	\$	-	\$	106.00
	141 E 72320 206 000 00000 000	\$	57.00	\$	-
	141 E 72320 189 000 00000 000	\$	-	\$	57.00
Year-End District Salary, Benefit, & Insurance Transfers	141 E 72410 139 000 00000 000	\$	5,700.00	\$	-
	141 E 72410 204 000 00000 000	\$	-	\$	5,700.00
	141 E 72410 207 000 00000 000	\$	711.00	\$	-
	141 E 72410 201 000 00000 000	\$	-	\$	711.00
	141 E 72520 189 000 00000 000	\$	1,000.00	\$	-
	141 E 72520 161 000 00000 000	\$	-	\$	500.00
	141 E 72520 187 000 00000 000	\$	-	\$	500.00
	141 E 72610 207 000 00000 000	\$	550.00	\$	-
	141 E 72610 166 000 00000 000	\$	-	\$	550.00
	141 E 72310 508 000 00000 000	\$	95.00	\$	-
	141 E 72610 501 000 00000 000	\$	375.00	\$	-
	141 E 72610 502 000 00000 000	\$	12,516.00	\$	-
	141 E 71900 599 000 00000 000	\$	-	\$	12,986.00

Establish Summer Learning Transportation Grant - from Contingency	141 E 72710 312 098 00000 123	\$	82,697.84	\$	-
	141 E 72710 412 098 00000 123	\$	10,000.00	\$	-
	141 E 71900 599 000 00000 000	\$	-	\$	43,995.76
	141 E 71900 599 000 00000 000	\$	-	\$	48,702.08

Adjust ISM Grant to Match ePlan	141 E 76100 399 023 00040 000	\$	20,000.00	\$	-
	141 E 71300 730 023 00040 000	\$	-	\$	20,000.00

	141 E 71100 116 098 00000 120	\$ 375,000.00	\$ -
	141 E 71100 201 098 00000 120	\$ 23,250.00	\$ -
	141 E 71100 204 098 00000 120	\$ 33,750.00	\$ -
	141 E 71100 212 098 00000 120	\$ 5,437.50	\$ -
	141 E 71100 217 098 00000 120	\$ 4,725.00	\$ -
Establish Summer Learning Camp Grant - from Contingency	141 E 71100 429 098 00000 120	\$ 6,107.12	\$ -
	141 E 72410 104 098 00000 120	\$ 53,279.22	\$ -
	141 E 72410 201 098 00000 120	\$ 3,303.31	\$ -
	141 E 72410 204 098 00000 120	\$ 4,795.13	\$ -
	141 E 72410 212 098 00000 120	\$ 772.55	\$ -
	141 E 72410 217 098 00000 120	\$ 671.00	\$ -
	141 E 71900 599 000 00000 000	\$ -	\$ 511,090.83
	TOTAL	\$ 1,746,875.07	\$ 1,746,875.07

Fund 142 Budget Transfers

Fund 142 REVENUES	Account Code	Decrease	Increase
Establish CRESO Grant Budget (From 141 Contingency)	142 R 47590 000 000 00000 000	\$ 94,407.37	\$ -
	142 R 47990 000 058 00000 000	\$ -	\$ 130,714.79
Adjust Title 1 Allocation to Match ePlan - Reduced Allocation	142 R 47141 000 101 00000 000	\$ 67,343.92	\$ -
	142 R 47590 000 000 00000 000	\$ -	\$ 67,343.92
Adjust IDEA-B Allocation to Match ePlan - Increased Allocation	142 R 47413 000 901 00000 000	\$ -	\$ 80,553.00
	142 R 47590 000 000 00000 000	\$ 41,517.83	\$ -
Adjust Title II Allocation to Match ePlan - Increased Allocation	142 R 47590 000 000 00000 000	\$ 6,809.73	\$ -
	142 R 47189 000 202 00000 000	\$ -	\$ 6,809.73
Adjust Title IV Allocation to Match ePlan - Reduced Allocation	142 R 47590 000 411 00000 000	\$ 3,094.64	\$ -
	142 R 47590 000 000 00000 000	\$ -	\$ 3,094.64
Adjust IDEA-PreK Allocation to Match ePlan - Increased Allocation	142 R 47590 000 000 00000 000	\$ 2,111.00	\$ -
	142 R 47145 000 911 00000 000	\$ -	\$ 2,111.00
Adjust HQIM Literacy Grant Allocation to Match ePlan - Increased Allocation	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
Establish CRESO Grant Budget		142 E 73300 189 058 00000 000	\$ 10,032.00	\$ -
		142 E 73300 201 058 00000 000	\$ 621.99	\$ -
		142 E 73300 212 058 00000 000	\$ 145.47	\$ -
		142 E 73300 204 058 00000 000	\$ 907.88	\$ -
		142 E 73300 524 058 00000 000	\$ 2,000.00	\$ -
		142 E 73300 790 058 00000 000	\$ 1,101.30	\$ -
		142 E 73300 429 058 00000 000	\$ 4,821.85	\$ -
		142 E 73300 399 058 00000 000	\$ 103,691.50	\$ -
		142 E 73300 504 058 00000 000	\$ 7,392.80	
		142 E 71900 000 000 00000 000	\$ -	\$ 94,407.37
Adjust Title III Grant Budget to Match ePlan		142 E 72210 499 303 00000 000	\$ -	\$ 3,000.00
		142 E 72210 524 303 00000 000	\$ 3,000.00	\$ -
Adjust Title I Grant Budget to Match ePlan		142 E 71100 116 101 00043 000	\$ -	\$ 11,177.13
		142 E 71100 207 101 00045 000	\$ 11,177.13	\$ -
Adjust Carl Perkins Grant to Match ePlan		142 E 72230 524 801 00000 000	\$ -	\$ 1,600.00
		142 E 71300 499 801 00000 000	\$ 1,600.00	\$ -
Adjust Title IV Grant Budget to Match ePlan		142 E 72130 206 411 00025 000	\$ 25.20	\$ -
		142 E 72130 208 411 00025 000	\$ 71.89	\$ -
		142 E 72130 299 411 00025 000	\$ 21.70	
		142 E 72130 599 411 00000 000	\$ 3,881.21	
		142 E 72210 499 411 00000 000	\$ -	\$ 4,000.00
Adjust Homeless Grant to Match ePlan		142 E 72130 399 701 00000 000	\$ -	\$ 2,550.33
		142 E 73100 422 701 00000 000	\$ 1,000.00	\$ -
		142 E 72130 524 701 00000 000	\$ 1,550.33	\$ -
Adjust Head Start Budget		142 E 73300 524 030 00043 000	\$ -	\$ 4,594.64
		142 E 73300 399 030 00043 000	\$ 4,594.64	\$ -

	142 E 73300 169 431 00045 000	\$	-	\$	1,275.00
	142 E 73300 189 431 00045 000	\$	1,275.00	\$	-
	142 E 73300 201 431 00045 000	\$	-	\$	67.75
	142 E 73300 524 431 00045 000	\$	63.77	\$	-
	142 E 73300 599 431 00045 000	\$	3.98	\$	-
	142 E 73300 204 431 00045 000	\$	-	\$	787.28
	142 E 73300 116 431 00045 000	\$	165.00	\$	-
	142 E 73300 189 431 00045 000	\$	605.00	\$	-
	142 E 73300 429 431 00045 000	\$	17.28	\$	-
	142 E 73300 212 431 00045 000	\$	-	\$	15.88
	142 E 73300 524 431 00045 000	\$	15.88	\$	-
	142 E 73300 399 431 00045 000	\$	-	\$	171.03
	142 E 73300 429 431 00045 000	\$	171.03	\$	-
	142 E 73300 599 431 00045 000	\$	-	\$	48.98
	142 E 73300 429 431 00045 000	\$	48.98	\$	-
Adjust 21st CCLC Grant Budget to Match ePlan	142 E 73300 116 431 00015 000	\$	-	\$	600.00
	142 E 73300 429 431 00015 000	\$	600.00	\$	-
	142 E 73300 116 431 00015 000	\$	-	\$	11,700.00
	142 E 73300 189 431 00015 000	\$	11,700.00	\$	-
	142 E 73300 204 431 00015 000	\$	-	\$	1,075.00
	142 E 73300 399 431 00015 000	\$	500.00	\$	-
	142 E 73300 429 431 00015 000	\$	740.20	\$	-
	142 E 73300 524 431 00015 000	\$	-	\$	165.20
	142 E 73300 169 431 00045 000	\$	-	\$	330.00
	142 E 73300 116 431 00045 000	\$	187.50	\$	-
	142 E 73300 201 431 00045 000	\$	-	\$	77.65
	142 E 73300 189 431 00045 000	\$	42.14	\$	-
	142 E 73300 212 431 00045 000	\$	-	\$	18.19
	142 E 73300 204 431 00045 000	\$	53.70	\$	-
	142 E 73300 189 431 00045 000	\$	142.50	\$	-
	142 E 73300 429 431 00045 000	\$	-	\$	452.06
	142 E 73300 189 431 00045 000	\$	452.06	\$	-

	142 E 71300 163 801 00035 000	\$	367.86	\$	-
	142 E 71300 201 801 00035 000	\$	59.87	\$	-
	142 E 71300 212 801 00035 000	\$	19.38	\$	-
	142 E 72130 355 801 00000 000	\$	-	\$	361.79
	142 E 72130 399 801 00000 000	\$	-	\$	100.00
Adjust Carl Perkins Grant to Match ePlan	142 E 71300 429 801 00000 000	\$	-	\$	365.70
	142 E 71300 429 801 00000 090	\$	-	\$	500.00
	142 E 71300 499 801 00000 000	\$	200.00	\$	-
	142 E 72230 524 801 00000 000	\$	-	\$	507.45
	142 E 99100 504 801 00000 000	\$	-	\$	99.81
	142 E 72130 524 801 00000 000	\$	-	\$	698.65
	142 E 71300 730 801 00000 000	\$	1,986.29	\$	-

Adjust Title IV Allocation to Match ePlan - Reduced Allocation	142 E 71900 000 000 00000 000	\$	3,094.64	\$	-
	142 E 72130 599 411 00000 000	\$	-	\$	3,094.64

Adjust Title II Allocation to Match ePlan - Increased Allocation	142 E 72210 524 202 00000 000	\$	6,809.73	\$	-
	142 E 71900 000 000 00000 000	\$	-	\$	6,809.73

	142 E 71900 000 000 00000 000	\$	67,343.92	\$	-
	142 E 72210 189 101 00000 000	\$	-	\$	48,634.50
	142 E 72210 201 101 00000 000	\$	-	\$	2,705.03
	142 E 72210 204 101 00000 000	\$	-	\$	4,226.34
Adjust Title 1 to Match ePlan - Reduced Allocation	142 E 72210 206 101 00000 000	\$	-	\$	63.00
	142 E 72210 207 101 00000 000	\$	-	\$	7,752.20
	142 E 72210 208 101 00000 000	\$	-	\$	182.65
	142 E 72210 212 101 00000 000	\$	-	\$	632.70
	142 E 72210 299 101 00000 000	\$	-	\$	54.25
	142 E 72210 524 101 00043 000	\$	-	\$	3,093.25

Adjust IDEA-PreK Allocation to Match ePlan - Increased Allocation	142 E 71200 163 911 00043 000	\$	1,892.87	\$	-
	142 E 99100 504 911 00043 000	\$	218.13	\$	-
	142 E 71900 000 000 00000 000	\$	-	\$	2,111.00
Adjust HQIM Literacy Grant Allocation to Match ePlan - Increased Allocation	142 E 71100 429 954 00000 000	\$	20,000.00	\$	-
	142 E 71900 000 000 00000 000	\$	-	\$	20,000.00
Adjust IDEA-B to Match ePlan - Increased Allocation (from 141 Contingency)	142 E 71200 206 901 00000 000	\$	400.00	\$	-
	142 E 71200 207 901 00000 000	\$	68,776.20	\$	-
	142 E 71200 208 901 00000 000	\$	1,600.00	\$	-
	142 E 71200 212 901 00000 000	\$	2,000.00	\$	-
	142 E 71200 299 901 00000 000	\$	400.00	\$	-
	142 E 72220 204 901 00000 000	\$	2,000.00	\$	-
	142 E 72220 208 901 00000 000	\$	600.00	\$	-
	142 E 99100 504 901 00000 000	\$	4,776.80	\$	-
142 E 71900 000 000 00000 000	\$	-	\$	41,517.83	
TOTAL		\$	592,251.09	\$	592,251.09

Fund 143 Budget Transfers

Fund 143 REVENUES	Account Code	Decrease	Increase
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FUND 143 EXPENDITURES	Account Code	Increase	Decrease
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	143 E 73100 103 000 00000 000	\$ 53,140.00	\$ -
	143 E 73100 165 000 00025 000	\$ -	\$ 33,790.00
	143 E 73100 201 000 00000 000	\$ 916.00	\$ -
	143 E 73100 204 000 00025 000	\$ -	\$ 403.00
End of Year Realignment	143 E 73100 207 000 00000 000	\$ 7,710.00	\$ -
	143 E 73100 212 000 00000 000	\$ 215.00	\$ -
	143 E 73100 217 000 00000 000	\$ 308.00	\$ -
	143 E 73100 710 000 00000 000	\$ -	\$ 103,096.00
	143 E 73100 399 000 00000 000	\$ 75,000.00	\$ -

TOTAL		\$ 137,289.00	\$ 137,289.00
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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 #4**
Date: June 17, 2024

The attached FY'24 Budget Transfer #4 includes the following budget requests for Board of Education approval:

- End of year realignment of multiple grant budgets.
- Establish Fiscal Pre-Monitoring Grant budget.

FY 24 FYTD Budget Summary - Budget Transfer #1,#2,#3,#4 & Amendment #1,#2, #3

Fund	FY24 Original Approved Budget	Budget Amendment #1, #2, #3	Budget Transfer #1, #2, #3, & #4	FY24 Revised & Amended Budget Amounts
Fund 141 (General Fund)	\$ 72,537,161.00	\$ 1,022,172.15	\$ (192,479.87)	\$ 73,366,853.28
Fund 142 (Federal)	\$ 5,087,614.00	\$ 2,277,596.47	\$ 192,479.87	\$ 7,557,690.34
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
TOTAL All Funds	\$ 81,232,427.00	\$ 3,299,768.62	\$ -	\$ 84,532,195.62

Fund 141 Budget Transfers

Fund 141 REVENUES	Account Number	Decrease	Increase
Establish Fiscal Pre-Monitoring Grant (To 142)	141 R 49700 000 000 00000 000	\$ 4,300.00	\$ -
	141 R 47640 000 000 00000 000	\$ 4,791.50	\$ -
Fund 141 EXPENDITURES	Account Number	Increase	Decrease
Establish Fiscal Pre-Monitoring Grant (to Fund 142)	141 E 71900 599 000 00000 001	\$ -	\$ 9,091.50
Adjust State SPED PreK Grant to Match ePlan	141 E 71200 116 010 00043 000	\$ -	\$ 2,170.00
	141 E 71200 207 010 00043 000	\$ -	\$ 3,935.00
	141 E 71200 725 010 00043 000	\$ 800.00	\$ -
	141 E 99100 504 010 00000 000	\$ 5,305.00	\$ -
Adjust SySTEM Grant Indirect Cost Budget	141 E 99100 590 022 00000 000	\$ 793.00	\$ -
	141 E 72230 504 022 00000 000	\$ -	\$ 793.00
TOTAL		\$ 15,196.50	\$ 15,196.50

Fund 142 Budget Transfers

Fund 142 REVENUES	Account Code	Decrease	Increase
Establish Fiscal Pre-Monitoring Grant (From 141)	142 R 47590 000 000 00000 000	\$ 20,000.00	\$ -
	142 R 47307 000 978 00000 000	\$ -	\$ 29,091.50
Reverse - Adjust HQIM Literacy Grant Allocation	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
CRESO Grant Budget Transfer	142 E 73300 308 058 00000 000	\$ 3,000.00	\$ -
	142 E 73300 399 058 00000 000	\$ -	\$ 3,000.00
Establish Fiscal Pre-Monitoring Grant (from 141)	142 E 72510 399 978 00000 000	\$ 29,091.50	\$ -
	142 E 71900 000 000 00000 000	\$ -	\$ 20,000.00
Reverse- Adjust HQIM Literacy Grant Allocation	142 E 71100 429 954 00000 000	\$ -	\$ 20,000.00
	142 E 71900 000 000 00000 000	\$ 20,000.00	\$ -
Adjust ESSER 3.0 Grant to Match ePlan	142 E 71100 449 936 00000 000	\$ -	\$ 16,611.77
	142 E 71100 471 936 00000 000	\$ 2,856.16	\$ -
	142 E 71100 722 936 00000 000	\$ -	\$ 4,239.10
	142 E 72130 790 936 00000 000	\$ -	\$ 38,465.27
	142 E 72210 189 936 00000 000	\$ 46,608.12	\$ -
	142 E 72210 201 936 00000 000	\$ 2,574.96	\$ -
	142 E 72210 204 936 00000 000	\$ 3,174.00	\$ -
	142 E 72210 206 936 00000 000	\$ 63.00	\$ -
	142 E 72210 207 936 00000 000	\$ 9,982.76	\$ -
	142 E 72210 208 936 00000 000	\$ 233.61	\$ -
	142 E 72210 212 936 00000 000	\$ 602.14	\$ -
	142 E 72210 524 936 00000 000	\$ -	\$ 4,616.46
	142 E 72210 299 936 00000 000	\$ 54.20	\$ -
	142 E 99100 504 936 00000 000	\$ -	\$ 2,216.35
TOTAL		\$ 158,240.45	\$ 158,240.45



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: Recommendation of Audit Firm for FY '24 Audit
Date: June 17, 2024

I recommend that Oak Ridge Schools approve the Audit Firm of Brown Jake & McDaniel, PC for performance of the FY24 Annual Audit. The attached Engagement Letter for the Board of Education audit for FY24 totals \$48,950.00 plus hourly rates for non-audit services. The Internal School Funds audit engagement letter was approved at the October 23, 2023 Board of Education meeting. The auditing services are budgeted in account code 141-72310-305.

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

BROWN JAKE & McDANIEL, PC

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JOE L. BROWN, CPA, CGFM, CGMA
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TERRY L. MOATS, CPA, CGFM, CGMA
JAMES E. BOOHER, CPA, CGMA
HALEY A. SLAGLE, CPA

MEMBERS
AMERICAN INSTITUTE OF
CERTIFIED PUBLIC ACCOUNTANTS

May 22, 2024

Jenifer Van Dyke
Finance Director
Oak Ridge Schools
PO Box 6588
Oak Ridge, Tennessee 37831-6588

We are pleased to confirm our understanding of the services we are to provide the Oak Ridge Schools (the Schools) for the year ending June 30, 2024. We will audit the financial statements of the governmental activities, business type activities, each major fund, and the aggregate remaining fund information, including the related notes to the financial statements, which collectively comprise the basic financial statements of the Schools as of and for the year ending June 30, 2024. Accounting standards generally accepted in the United States provide for certain required supplementary information (RSI), such as management's discussion and analysis (MD&A), to accompany the Schools' basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. As part of our engagement, we will apply certain limited procedures to the Schools' RSI in accordance with auditing standards generally accepted in the United States of America. These limited procedures will consist of inquiries of management regarding the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We will not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient evidence to express an opinion or provide any assurance. The following RSI is required by generally accepted accounting principles and will be subjected to certain limited procedures, but will not be audited:

- 1) Management's Discussion and Analysis
- 2) Schedule of Changes in the Net Pension Liability (Asset) and Related Ratios Based on Participation in the Public Employee Pension Plan of TCRS
- 3) Schedule of Oak Ridge School System's Contributions Based on Participation in the Public Employee Pension Plan of TCRS
- 4) Schedule of Oak Ridge School System's Proportionate Share of the Net Pension Asset – Teacher Legacy Pension Plan of TCRS
- 5) Schedule of Oak Ridge School System's Contributions – Teacher Legacy Pension Plan of TCRS
- 6) Schedule of Oak Ridge School System's Proportionate Share of the Net Pension Liability (Asset) – Teacher Hybrid Pension Plan of TCRS
- 7) Schedule of Oak Ridge School System's Contributions – Teacher Hybrid Pension Plan of TCRS
- 8) Schedule of Changes in the Net Pension Liability (Asset) and Related Ratios Based on Participation in the Hybrid Employee Pension Plan of TCRS

- 9) Schedule of Oak Ridge School System's Contributions Based on Participation in the Hybrid Employee Pension Plan of TCRS
- 10) Schedule of Changes in Total OPEB Liability and Related Ratios Based on Participation in the TGOP OPEB Plan
- 11) Schedule of Changes in Total OPEB Liability and Related Ratios Based on Participation in the TNP OPEB Plan

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

- 1) Combining Fund Financial Statements:
 - a) Combining Balance Sheet – Nonmajor Governmental Funds
 - b) Combining Statement of Revenues, Expenditures and Changes in Fund Balances – Nonmajor Governmental Funds
 - c) Combining Statement of Revenues, Expenditures and Changes in Fund Balances – Budget and Actual – Nonmajor Governmental Funds
- 2) Schedule of Expenditures of Federal and State Awards
- 3) Notes to Schedule of Expenditures of Federal Awards
- 4) Schedule of Noncash Federal Awards
- 5) Schedule of Changes in Long-Term Debt by Individual Issue

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

- 1) Introductory Section
- 2) Statistical Section

Audit Objectives

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

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

The *Government Auditing Standards* report on internal control over financial reporting and on compliance and other matters will include a paragraph that states that (1) the purpose of the report is solely to describe the scope

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

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

Audit Procedures—General

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

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

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

Audit Procedures—Internal Control

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

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

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

Audit Procedures—Compliance

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

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

Other Services

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

We will perform the services in accordance with applicable professional standards. The other services are limited to the financial statements, schedule of expenditures of federal awards, and related notes services previously defined. We, in our sole professional judgment, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities.

Management Responsibilities

Management is responsible for (1) establishing and maintaining effective internal controls, including internal controls over federal awards, and for evaluating and monitoring ongoing activities, to help ensure that appropriate goals and objectives are met; (2) following laws and regulations; (3) ensuring that there is reasonable assurance that government programs are administered in compliance with compliance requirements; and (4) ensuring that management and financial information is reliable and properly reported. Management is also responsible for implementing systems designed to achieve compliance with applicable laws, regulations, contracts, and grant

agreements. You are also responsible for the selection and application of accounting principles; for the preparation and fair presentation of the financial statements, schedule of expenditures of federal and state awards, and all accompanying information in conformity with U.S. generally accepted accounting principles; and for compliance with applicable laws and regulations (including federal statutes) and the provisions of contracts and grant agreements (including award agreements). Your responsibilities also include identifying significant contractor relationships in which the contractor has responsibility for program compliance and for the accuracy and completeness of that information.

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

Your responsibilities include adjusting the financial statements to correct material misstatements and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the government involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the government received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the government complies with applicable laws, regulations, contracts, agreements, and grants. Management is also responsible for taking timely and appropriate steps to remedy fraud and noncompliance with provisions of laws, regulations, contracts, and grant agreements, or abuse that we report. Additionally, as required by the Uniform Guidance, it is management's responsibility to evaluate and monitor noncompliance with federal statutes, regulations, and the terms and conditions of federal awards; take prompt action when instances of noncompliance are identified including noncompliance identified in audit findings; promptly follow up and take corrective action on reported audit findings; and prepare a summary schedule of prior audit findings and a separate corrective action plan. The summary schedule of prior audit findings should be available for our review on September 1, 2024.

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

You are also responsible for the preparation of the other supplementary information, which we have been engaged to report on, in conformity with U.S. generally accepted accounting principles. You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the supplementary

information in accordance with GAAP; (2) you believe the supplementary information, including its form and content, is fairly presented in accordance with GAAP; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the supplementary information.

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

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

Engagement Administration, Fees, and Other

We may from time to time and depending on the circumstances, use third-party service providers in serving your account. We may share confidential information about you with these service providers, but remain committed to maintaining the confidentiality and security of your information. Accordingly, we maintain internal policies, procedures, and safeguards to protect the confidentiality of your personal information. In addition, we will secure confidentiality agreements with all service providers to maintain the confidentiality of your information and we will take reasonable precautions to determine that they have appropriate procedures in place to prevent the unauthorized release of your confidential information to others. In the event that we are unable to secure an appropriate confidentiality agreement, you will be asked to provide your consent prior to the sharing of your confidential information with the third-party service provider. Furthermore, we will remain responsible for the work provided by any such third-party service providers.

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

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

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

The audit documentation for this engagement is the property of Brown Jake & McDaniel, PC and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to a cognizant or oversight agency for audit (if applicable) or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit

documentation will be provided under the supervision of Brown Jake & McDaniel PC personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

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

We expect to begin our audit on approximately June 30, 2024 and to issue our reports no later than December 31, 2024. Terry Moats is the engagement partner and is responsible for supervising the engagement and signing the reports or authorizing another individual to sign them.

Our fee for these services will be \$48,950.00 plus out-of-pocket costs (such as report production, word processing, postage, travel, travel time, copies, telephone, etc.) and additional fees at normal hourly rates for any work related to CARES Act funding or non-audit services related to implementation of new GASB Standards/Pronouncements and the related changes to the financial statement presentation. Our invoices for these fees will be rendered each month as work progresses and are payable on presentation. In accordance with our firm policies, work may be suspended if your account becomes 60 days or more overdue and may not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed upon written notification of termination, even if we have not completed our report(s). You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket costs through the date of termination. The above fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the audit. If significant additional time is necessary, we will discuss it with you and arrive at a new fee estimate before we incur the additional costs.

Government Auditing Standards require that we provide you with a copy of our most recent external peer review report and any letter of comment, and any subsequent peer review reports and letters of comment received during the period of the contract. Our 2021 peer review report accompanies this letter.

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

Very truly yours,

BROWN JAKE & McDANIEL, PC

RESPONSE:

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

By: _____

Title: _____

Date: _____



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 *JVD*

Date: June 17, 2024

RE: Fiscal Pre-Monitoring Supports Grant Acceptance

I recommend Board of Education approval of the FY24 Fiscal Pre-Monitoring Supports grant application in the amount of \$29,091.50. Funds from this grant will be used to support District contracted services in support of ESSER goals.



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Budget Overview

Oak Ridge (012) Public District - FY 2024 - Fiscal Pre-Monitoring Supports Grant - Rev 0 - Fiscal Pre-Monitoring Supports Grant

Go To

Filter by Location: All - \$29,091.50

[Show Unbudgeted Categories](#)

Account Number	72510 - Fiscal Services	Total
Line Item Number		
399 - Other Contracted Services	29,091.50	29,091.50
Total	29,091.50	29,091.50
	Adjusted Allocation	29,091.50
	Remaining	0.00

VanDyke, Jenifer

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TN Department of Education | Andrew Johnson Tower | 710 James Robertson Parkway | Nashville, TN 37243 | (629) 395-4684 | ePlan.Help@tn.gov



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 *JVD*
Date: 6/17/2024
Re: Recommendation of Resolution Approval

I recommend that Oak Ridge Schools Board of Education approve the FY25 Federal Projects Fund Budget Resolution. This resolution will dismiss further approval requirements by the school board for federal budgets that have revisions approved by the Tennessee Department of Education in ePlan during FY25.



FY25 Federal Projects Fund Budget Resolution

WHEREAS, the Comptroller of the State of Tennessee provides Boards of Education the authority to adopt language within the annual budget regarding federal project budgets approved by the Tennessee Department of Education; AND

WHEREAS, the Board of Education approved the Fiscal Year 2025 budget on May 20, 2024, which included a basic budget for the School Federal Projects Fund; AND

WHEREAS, the budget approved on May 20, 2024 did not include the required language; AND

WHEREAS, the Board of Education now wishes to include the required language as set forth by the Comptroller. Upon approval, the effective date of this resolution shall be July 1, 2024 and will expire on June 30, 2025.

NOW, THEREFORE BE IT FURTHER RESOLVED, that the budgets of the School Federal Projects Fund be the budget approved for separate projects within the fund by the Tennessee Department of Education during the 2024-2025 fiscal year without further approval needed by the Board of Education during the same time.

On this the 17th day of June, 2024

Keys Fillauer – Chairman
Oak Ridge Schools Board of Education

ATTEST:

Dr. Bruce T. Borchers, Ph.D., Superintendent
Oak Ridge Schools Board of Education
Secretary to the Board

**OAK RIDGE BOARD OF EDUCATION
ANNUAL AGENDA
2024-2025**



MEMBERS OF THE BOARD OF EDUCATION

**Keys Fillauer – Chair
Laura McLean – Vice Chair
Angi Agle
Erin Webb
Heather Hartman**

INTRODUCTION

The Annual Agenda highlights items for Board consideration as well as items for information. It is not intended to be all-inclusive and does not include routine business issues (e.g. approval of Board meeting minutes, budget amendments, etc.) The Annual Agenda is a work in progress. Items may be added at any board meeting.

Supportive data for items listed on the Annual Agenda will be provided as a part of the agenda that is sent to board members prior to each Board meeting.

August – 1st Meeting (in lieu of July)

- Oak Ridge Schools Personnel Advisory Board
- Oak Ridge Schools Sick Leave Bank Board of Trustees
- Home Depot Blanket Purchase Order
- Preschool Head Start COLA and Quality Improvement Fund
- July Board Policy Review

August – 2nd Meeting

- August Board Policy Review
- Audit Contract

September

- September Board Policy Review
- Internal Schools Funds Audit

October

- Compliance Report
- Comparability Report
- October Board Policy Review

November

- Proposed Budget Timeline
- Head Start Self-Assessment
- Board of Education Self-Evaluation
- November Board Policy Review

January – 1st Meeting (in lieu of December)

- Tenure Status for Eligible Staff Members
- Audit
- Superintendent's Evaluation
- December Board Policy Review

January – 2nd Meeting

- School Board Appreciation Week
- Extension of Superintendent’s Contract
- ORHS New Course Requests
- Recognition of Teacher of the Year, etc...
- January Board Policy Review

February

- February Board Policy Review
- District School Calendar
- Tenure

March

- OREA Salary Proposal
- Principals’ Salary Proposal
- Selection of Oak Ridge Schools Volunteer of the Year
- Non-Resident Tuition Rates
- Oak Log Contract
- March Board Policy Review

April

- Summer School Fees
- Budget Concepts
- Recognition of Oak Ridge Schools Volunteer of the Year
- Textbook Adoption Committee
- April Board Policy Review

May

- Oak Ridge Schools Student Recognition Award
- Recognition of Oak Ridge Schools Retirees
- Budget Work Sessions and Final Adoption of Budget
- Student Class Fees
- Food Service Contract Renewal
- Board Meeting Calendar
- Student Discipline Code of Conduct
- May Board Policy Review

June

- Annual Copy Paper Bid
- Board of Education Annual Agenda Approval
- June Board Policy Review



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 *JVD*
Date: 6/4/2024
Re: Recommendation of Annual Copy Paper Bid and Purchase Approval

I recommend that Oak Ridge Schools Board of Education approve American Paper & Twine for the annual District Paper purchases. They hold the Statewide Contract for the State of Tennessee. Over the course of the year, the District will purchase paper in excess of \$25,000 from this single vendor which requires Board approval. The funding for this annual purchase will come from various school and departmental budget account codes designated in the ordering process.

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



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 *JVD*

Date: June 17, 2024

RE: Food Service Contract Renewal/Amendment for FY25

I recommend approval of the attached Amendment No. 1 to the District's Food Services Management Agreement for FY25. This will be the second year of the contract with Southwest Foodservice Excellence, LLC. for our food service program management.

The annual general and administrative expenses fee will increase by 4.7% (from \$79,945 to \$83,703.41), divided equally over twelve months. Additionally, the management fee will increase by 4.7% (from \$35,006.54 to \$36,651.84). The FY25 Contract also includes a continued guaranteed budget surplus of \$75,000 for the District's Food Service Fund.

The following meal price changes are recommended based on the USDA paid lunch equity calculations:

- Elementary student lunch: \$3.50 (Increase of \$0.45)
- Middle/High student lunch: \$3.75 (Increase of \$0.45)
- Student breakfast: \$2.00 (Increase of \$0.35)
- Adult lunch: \$4.50 (Increase of \$0.50)
- Adult Breakfast: \$2.75 (Increase of \$0.40)
- Second meal charges will increase the same amount as the first meal charges.

A la Carte items will also be adjusted:

- Vegetable & fruit servings: \$1.00 (Decrease of \$0.30)
- Chips: \$1.50 (Increase of \$0.50)

The Food Service Program is a self-supporting fund and does not affect the General Purpose Budget.

Attachment: Amendment No. 1 to Food Services Management Agreement

FOOD SERVICE MANAGEMENT COMPANY (FSMC) CONTRACT RENEWAL
Oak Ridge Schools
Contract Period: July 1, 2024 through June 30, 2025

Per State requirement, SFA's with fixed price FSMC agreements must comply with the nonprogram foods requirement in 7 CFR Part 210.14. The Parties to the Base Contract shall agree to the following Base Contract changes:

The FSMC shall provide SFA with food cost data it requests in order to determine the SFA's compliance with the revenue from nonprogram foods requirements. The information provided by the FSMC must be sufficient for the SFA to be able to provide specific information about the food service operation and all required products and services they are seeking to procure. For example, essential information includes:

- For fixed price per meal contracts, awarded on a per meal basis and with revenues from nonprogram foods sales converted into meal equivalents to which the fixed price cost is applied, the FSMC will annually provide information on food costs and revenues. The information must include food cost for reimbursable meals, food cost for non-program foods, revenue from non-program foods, and total revenue. Nonprogram foods include: a la carte; catering; vending; and student stores operated, or any other sales generated through the nonprofit school food service account not already described. This information is used to determine compliance with revenue from nonprogram foods at 7 CFR 210.14(f).
- Historical information on the type and value of nonprogram foods and meals to be offered in other food service operation, for example, catering. When the FSMC will be responsible for providing the SFA

**FOOD SERVICE MANAGEMENT COMPANY (FSMC) CONTRACT RENEWAL AGREEMENT
Oak Ridge Schools
Contract Period: July 1, 2023 through June 30, 2024**

with, or calculating nonprogram food costs and program revenues for compliance with the 7 CFR Part 210.14(f), the contract must clearly identify this requirement.

No modifications or changes shall be made to this Contract without full consent of all signatories. Any additions or changes to the Contract that change or negate the mandatory portions of the Contract as written shall automatically invalidate the Contract.

ATTEST:

SCHOOL FOOD AUTHORITY (SFA)

Witness	Name of SFA Oak Ridge Schools
	Signature of Authorized Representative
	Printed Name of Authorized Representative
	Title
	Date

ATTEST:

FOOD SERVICE MANAGEMENT (FSMC)

<p><i>Allison L. Purmont</i> F5D6E142AC89B9151D37A420AD59FCC0 contractworks</p> <p>Witness</p>	Name of FSMC Southwest Foodservice Excellence
	Signature of Authorized Representative <i>Monty Staggs</i>
	Printed Name of Authorized Representative Monty Staggs
	Title Chief Executive Officer
	Date 06/11/2024

APPROVAL:

**TENNESSEE DEPARTMENT OF
EDUCATION (TDOE)**

Signature of Authorized Representative
Printed Name of Authorized Representative
Title
Date

Southwest Foodservice Excellence, LLC

By indication of the authorized signature below, the Proposer does hereby make certification and assurance of the Proposer's compliance with:

- i. Title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000d et seq.);
- ii. Title IX of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.);
- iii. Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794);
- iv. Age Discrimination Act of 1975 (42 U.S.C. 6101 et seq.);
- v. Title II and Title III of the Americans with Disabilities Act (ADA) of 1990 as amended by the ADA Amendment Act of 2008 (42 U.S.C. 12131-12189);
- vi. Executive Order 13166, "Improving Access to Services for Persons with Limited English Proficiency." (August 11, 2000);
- vii. All provisions required by the implementing regulations of the Department of Agriculture (USDA) (7 CFR Part 15 et seq.);
- viii. Department of Justice Enforcement Guidelines (28 CFR Parts 35, 42 and 50.3);
- ix. Food and Nutrition Service (FNS) directives and guidelines to the effect that, no person shall, on the grounds of race, color, national origin, sex, age, or disability, be excluded from participation in, be denied the benefits of, or otherwise be subject to discrimination under any program or activity for which the Program applicant receives Federal financial assistance from USDA; and hereby gives assurance that it will immediately take measures necessary to effectuate this Agreement.
- x. The USDA non-discrimination statement that in accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs).

This assurance is given in consideration of and for the purpose of obtaining any and all Federal financial assistance, grants, and loans of Federal funds, reimbursable expenditures, grant, or donation of Federal property and interest in property, the detail of Federal personnel, the sale and lease of, and the permission to use Federal property or interest in such property or the furnishing of services without consideration or at a nominal consideration, or at a consideration that is reduced for the purpose of assisting the recipient, or in recognition of the public interest to be served by such sale, lease, or furnishing of services to the recipient, or any improvements made with Federal financial assistance extended to the Program applicant by USDA. This includes any Federal agreement, arrangement, or other contract that has as one of its purposes the provision of cash assistance for the purchase of food, and cash assistance for purchase or rental of food service equipment or any other financial assistance extended in reliance on the representations and agreements made in this assurance.

Monty Staggs

103EC93051EC194C25F57AB80DD54312

contractworks

06/11/2024

Proposer Signature and Date



Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion Lower Tier Covered Transactions

The following statement is made in accordance with the Privacy Act of 1974 (5 U.S.C. § 552a, as amended). This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, and 2 CFR §§ 180.300, 180.335, Participants' responsibilities. The regulations were amended and published on August 31, 2005, in 70 Fed. Reg. 51865-51880. Copies of the regulations may be obtained by contacting the Department of Agriculture agency offering the proposed covered transaction.

According to the Paperwork Reduction Act of 1995, an agency may not conduct or sponsor, and a person is not required to respond to a collection of information unless it displays a valid OMB control number. The valid OMB control number for this information collection is 0505-0027. The time required to complete this information collection is estimated to average 15 minutes per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. The provisions of appropriate criminal or civil fraud, privacy, and other statutes may be applicable to the information provided.

(Read instructions on page two before completing certification.)

- A. The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals is presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency;
- B. Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

ORGANIZATION NAME Southwest Foodservice Excellence	PR/AWARD NUMBER OR PROJECT NAME
NAME(S) AND TITLE(S) OF AUTHORIZED REPRESENTATIVE(S) Monty Staggs/ Chief Executive Officer	
SIGNATURE <i>Monty Staggs</i> <small>103EC93051EC194C25F57AB80DD54312 contractworks</small>	DATE 04/22/2024

In accordance with Federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, the USDA, its Agencies, offices, and employees, and institutions participating in or administering USDA programs are prohibited from discriminating based on race, color, national origin, religion, sex, gender identity (including gender expression), sexual orientation, disability, age, marital status, family/parental status, income derived from a public assistance program, political beliefs, or reprisal or retaliation for prior civil rights activity, in any program or activity conducted or funded by USDA (not all bases apply to all programs). Remedies and complaint filing deadlines vary by program or incident.

Persons with disabilities who require alternative means of communication for program information (e.g., Braille, large print, audiotape, American Sign Language, etc.) should contact the responsible Agency or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339. Additionally, program information may be made available in languages other than English.

To file a program discrimination complaint, complete the USDA Program Discrimination Complaint Form, AD-3027, found online at [How to File a Program Discrimination Complaint](#) and at any USDA office or write a letter addressed to USDA and provide in the letter all of the information requested in the form. To request a copy of the complaint form, call (866) 632-9992. Submit your completed form or letter to USDA by: (1) mail: U.S. Department of Agriculture, Office of the Assistant Secretary for Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410; (2) fax: (202) 690-7442; or (3) email: program.intake@usda.gov.

USDA is an equal opportunity provider, employer, and lender.

Instructions for Certification

- (1) By signing and submitting this form, the prospective lower tier participant is providing the certification set out on page 1 in accordance with these instructions.
- (2) The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the Department or agency with which this transaction originated may pursue available remedies, including suspension or debarment.
- (3) The prospective lower tier participant must provide immediate written notice to the person(s) to which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.
- (4) The terms "covered transaction," "debarred," "suspended," "ineligible," "lower tier covered transaction," "participant," "person," "primary covered transaction," "principal," "proposal," and "voluntarily excluded," as used in this clause, have the meanings set out in the Definitions and Coverage sections of the rules implementing Executive Order 12549, at 2 CFR Parts 180 and 417. You may contact the Department or agency to which this proposal is being submitted for assistance in obtaining a copy of those regulations.
- (5) The prospective lower tier participant agrees by submitting this form that, should the proposed covered transaction be entered into, it may not knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the Department or agency with which this transaction originated.
- (6) The prospective lower tier participant further agrees by submitting this form that it will include this clause titled "Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion - Lower Tier Covered Transactions," without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
- (7) A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that is not debarred, suspended, ineligible, or voluntarily excluded from the covered transaction, unless it knows that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may, but is not required to, check the General Services Administration's System for Award Management Exclusions database.
- (8) Nothing contained in the foregoing shall be construed to require establishment of a system of records to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
- (9) Except for transactions authorized under paragraph (5) of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the Department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.

CERTIFICATION REGARDING LOBBYING

Applicants must review the requirements for certification regarding lobbying included in the regulations cited below before completing this form. Applicants must sign this form to comply with the certification requirements under 34 CFR Part 82, "New Restrictions on Lobbying". This certification is a material representation of fact upon which the Department of Education relies when it makes a grant or enters into a cooperative agreement.

As required by Section 1352, Title 31 of the U.S. Code, and implemented at 34 CFR Part 82, for persons entering into a Federal contract, grant or cooperative agreement over \$100,000, as defined at 34 CFR Part 82, Sections 82.105 and 82.110, the applicant certifies that:

(a) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the making of any Federal grant, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal grant or cooperative agreement;

(b) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form - LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions;

(c) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subgrants and contracts under grants and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

As the duly authorized representative of the applicant, I hereby certify that the applicant will comply with the above certification.

NAME OF APPLICANT	PR/AWARD NUMBER AND / OR PROJECT NAME
Southwest Foodservice Excellence, LLC	
PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE	
Monty Staggs, CEO	
SIGNATURE <i>Monty Staggs</i>	DATE
<small>103EC93051EC194C25F57AB80DD54312 contractworks.</small>	06/11/2024

INSTRUCTIONS FOR COMPLETION OF SF-LLL, DISCLOSURE OF LOBBYING ACTIVITIES

This disclosure form shall be completed by the reporting entity, whether subawardee or prime Federal recipient, at the initiation or receipt of a covered Federal action, or a material change to a previous filing, pursuant to title 31 U.S.C. section 1352. The filing of a form is required for each payment or agreement to make payment to any lobbying entity for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a covered Federal action. Complete all items that apply for both the initial filing and material change report. Refer to the implementing guidance published by the Office of Management and Budget for additional information.

1. Identify the type of covered Federal action for which lobbying activity is and/or has been secured to influence the outcome of a covered Federal action.
2. Identify the status of the covered Federal action.
3. Identify the appropriate classification of this report. If this is a followup report caused by a material change to the information previously reported, enter the year and quarter in which the change occurred. Enter the date of the last previously submitted report by this reporting entity for this covered Federal action.
4. Enter the full name, address, city, State and zip code of the reporting entity. Include Congressional District, if known. Check the appropriate classification of the reporting entity that designates if it is, or expects to be, a prime or subaward recipient. Identify the tier of the subawardee, e.g., the first subawardee of the prime is the 1st tier. Subawards include but are not limited to subcontracts, subgrants and contract awards under grants.
5. If the organization filing the report in item 4 checks "Subawardee", then enter the full name, address, city, State and zip code of the prime Federal recipient. Include Congressional District, if known.
6. Enter the name of the federal agency making the award or loan commitment. Include at least one organizational level below agency name, if known. For example, Department of Transportation, United States Coast Guard.
7. Enter the Federal program name or description for the covered Federal action (item 1). If known, enter the full Catalog of Federal Domestic Assistance (CFDA) number for grants, cooperative agreements, loans, and loan commitments.
8. Enter the most appropriate Federal identifying number available for the Federal action identified in item 1 (e.g., Request for Proposal (RFP) number; Invitations for Bid (IFB) number; grant announcement number; the contract, grant, or loan award number; the application/proposal control number assigned by the Federal agency). Included prefixes, e.g., "RFP-DE-90-001".
9. For a covered Federal action where there has been an award or loan commitment by the Federal agency, enter the Federal amount of the award/loan commitment for the prime entity identified in item 4 or 5.
10. (a) Enter the full name, address, city, State and zip code of the lobbying registrant under the Lobbying Disclosure Act of 1995 engaged by the reporting entity identified in item 4 to influence the covered Federal action.

(b) Enter the full names of the individual(s) performing services, and include full address if different from 10(a). Enter Last Name, First Name, and Middle Initial (MI).
11. The certifying official shall sign and date the form, print his/her name, title, and telephone number.

According to the Paperwork Reduction Act, as amended, no persons are required to respond to a collection of information unless it displays a valid OMB control Number. The valid OMB control number for this information collection is OMB No. 0348-0046. Public reporting burden for this collection of information is estimated to average 10 minutes per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Office of Management and Budget, Paperwork Reduction Project (0348-0046), Washington, DC 20503

Disclosure of Lobbying Activities

Complete this form to disclose lobbying activities pursuant to 31 U.S.C. 1352
(See reverse for public burden disclosure)

1. Type of Federal Action: a. contract ___ b. grant c. cooperative agreement d. loan e. loan guarantee f. loan insurance	2. Status of Federal Action: a. bid/offer/application ___ b. initial award c. post-award	3. Report Type: a. initial filing ___ b. material change For material change only: Year _____ quarter _____ Date of last report _____
4. Name and Address of Reporting Entity: ___ Prime ___ Subawardee Tier _____, if Known: Congressional District, <i>if known</i> :	5. If Reporting Entity in No. 4 is Subawardee, Enter Name and Address of Prime: Congressional District, <i>if known</i> :	
6. Federal Department/Agency:	7. Federal Program Name/Description: CFDA Number, <i>if applicable</i> : _____	
8. Federal Action Number, if known:	9. Award Amount, if known: \$	
10. a. Name and Address of Lobbying Registrant <i>(if individual, last name, first name, MI):</i>	b. Individuals Performing Services <i>(including address if different from No. 10a)</i> <i>(last name, first name, MI):</i> Monty Staggs	
11. Information requested through this form is authorized by title 31 U.S.C. section 1352. This disclosure of lobbying activities is a material representation of fact upon which reliance was placed by the tier above when this transaction was made or entered into. This disclosure is required pursuant to 31 U.S.C. 1352. This information will be reported to the Congress semi-annually and will be available for public inspection. Any person who fails to file the required disclosure shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.	Signature: <u>Monty Staggs</u> 103EC93051EC194C25E57AB80DD54312 contractworks Print Name: Monty Staggs Title: Chief Executive Officer Telephone No.: 480-551-6550 Date: 06/11/2024	
Federal Use Only	Authorized for Local Reproduction Standard Form - LLL (Rev. 7-97)	

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INTRODUCTION

To Students, Parents and Oak Ridge Schools Staff:

At Oak Ridge Schools, we are committed to fostering an educational atmosphere where every student can thrive academically, socially, and emotionally. Our discipline policies are designed to support this commitment by promoting positive behavior, personal responsibility, and mutual respect. The guidelines outlined in this handbook reflect our dedication to maintaining a school environment that is conducive to learning and personal development.

It is the purpose of the Oak Ridge Schools Discipline Code booklet to provide the framework for governing student policies related to disciplinary expectations, procedures and responsibilities approved by the Board of Education. This publication provides students, parents, school personnel, and the public a concise and comprehensive description of the minimum standards of behavior for all students enrolled in the public schools of Oak Ridge. It defines appropriate student conduct and presents a menu of alternatives to be employed by school administrators and staff to address individuals who exhibit inappropriate behavior. Emphasis is placed upon the right of all students to accept the challenge of maximizing their educational program through responsible behavior and academic achievement.

We believe that effective discipline is a collaborative effort between the school, students, parents, and the community. By working together, we can create a supportive framework that encourages students to make responsible choices and understand the consequences of their actions. This partnership is essential in helping our students develop into well-rounded individuals who are prepared for success in both their academic and personal lives.

I encourage you to review the Student Discipline Handbook carefully and discuss its contents with your students. Understanding the expectations and consequences outlined in this document will help ensure that our schools remain a place where respect, safety, and academic excellence are paramount.

Please keep this code booklet for reference throughout the school year. Should you have any questions concerning any information included in this document, please do not hesitate to talk with your school principal or contact the Office of Student Services.

Sincerely,

Bruce Borchers
Dr. Bruce Borchers Superintendent

EXPECTATIONS & ROLE DEFINITIONS

EXPECTATIONS

Each individual within the school community has rights and responsibilities related to enjoying the benefits of the learning environment. The expectations for each group are identified in this section.

Students are expected to:

- Attend school, be on time and not skip class.
- Take advantage of the opportunity to learn.
- Assume responsibility for personal growth and self-discipline.
- Take care of both personal and school property.
- Respect the rights and property of others.
- Work cooperatively with school personnel and other students.
- Know and follow school rules.
- Respect school staff and the reasonable exercises of authority by school staff.
- Maintain appropriate classroom conduct.
- Dress and groom in a manner that meets reasonable standards of health, cleanliness, modesty, and safety.

Teachers, Counselors, and Support Staff are expected to:

- Work collaboratively with each other, parents, and students to improve student behavior and to maintain a positive learning environment.
- Be knowledgeable of instructional techniques, which enhance and improve student behavior.
- Teach and model desired behaviors. Provide appropriate consequences and reinforce appropriate behavior.
- Confront any student misbehavior whenever observed in all school settings.
- Use interpersonal skills, which permits the de-escalation of student-staff conflict.
- Contact and involve parents in dealing with disciplinary and/or academic matters.
- Provide a flexible curriculum to meet individual needs.
- Maintain a safe and orderly school environment.
- Inform the community, students, and school staff of policies relating to pupil conduct.

Administrators are expected to:

- Protect the due process rights of teachers, students, and parents. Support other school personnel in the fulfillment of their disciplinary responsibilities.
- Contact and involve parents in dealing with disciplinary matters.
- Maintain a safe and orderly school environment.
- Inform the community, students, and school staff of policies relating to pupil conduct.

Parents are expected to:

- Ensure that the child attends school and is on time.
- Communicate with school personnel about their child and make themselves readily and easily accessible when the school needs to make contact.
- Realize the extent of responsibility for the behavior of their child.
- Prepare their child to assume responsibility for his/her own behavior.
- Foster positive attitudes in their child toward self, others, school, and community.
- Know and follow school regulations.

Rules and Expectations for Cross-Boundary/Tuition Students:

For a tuition or cross-boundary student to remain in their school of choice, the student must maintain **satisfactory achievement, good attendance, and acceptable behavior**. Each principal has the right to revoke the privilege after notice to the parent for help in addressing any problems. Specific guidelines have been established for revocation of cross boundary or tuition status. (See policy in section “Other School Information”)

School Conduct

Students are expected to exhibit appropriate behavior at all times. Appropriate behavior includes showing respect for staff members and other students, paying attention, contributing appropriately to discussions, using appropriate language, following teachers' directions, refraining from making unnecessary and disruptive comments, etc.

Bus Conduct

Students are expected to follow the rules and regulations established by the Oak Ridge Schools' Transportation Policies. All students will be responsible to:

- Board the bus in a calm and reasonably quiet manner.
- Act with courtesy toward the driver and fellow students.
- Go immediately to a seat, sit down, and remain there until time to disembark.
- Cooperate with the bus driver in providing any information needed to enforce the rules of safety.
- Depart from the bus in a quiet, calm, and cautious manner and cross the street in front of the bus while traffic is stopped.
- Observe safety rules and respect the rights of others while waiting for the bus.
- Act with courtesy and respect toward private and public property.
- Cooperate fully with parents, teachers, and principals in obeying the rules established for the safety of all students.
- Maintain personal possessions at all times.
- Refrain from holding a seat for another person.
- Remain behind the driver's seat until the bus has come to a complete stop.
- Refrain from opening and closing windows without permission from the driver or other adult supervisor.
- Refrain from placing any body part or personal belonging outside the window
- Refrain from loud talking, screaming, and other boisterous behavior, which could distract the driver.
- Observe all related school rules.

Parents of kindergarten students must be visible at the student's bus stop.

The school bus is considered an extension of the school. Consequences for bus misbehavior will be the same as those employed for school rule violations within the school setting.

Student Behavior at School Events/Activities

School sponsored field trips, athletic events, or other activities are considered an integral part of the school program. All school rules and student behavior codes apply to student participants and student spectators at these events.

Visitor Code of Conduct

Except on occasions such as school programs, athletic events, open house, and similar public events, all visitors will report to the school office when entering the school and will sign-in. Persons who come onto school property shall be under the jurisdiction of the site administrator/designee.

Individuals who come onto school property or who contact employees on school or district business are expected to behave accordingly. The Visitor Code of Conduct is as follows:

Parents, community members, and any other visitors to school property or during school programs/activities **MUST NOT**:

1. Act in a threatening manner toward another or others.
2. Injure or threaten another or others.
3. Damage school property, or the personal property of another or others.
4. Disrupt classes, school programs or other school activities in any way.
5. Communicate with another or others in an abusive, harassing, or threatening manner.
6. Audio or video record where there is an expectation of privacy (*i.e.*, classroom instruction, locker rooms, etc.).
7. Disrupt school transportation or confront transportation staff on a bus/vehicle, a road, a neighborhood, etc.
8. Distribute or wear materials which are vulgar, obscene, advocate illegal action, promote drugs, or are disruptive.
9. Harass or discriminate against another or others based on protected class status (*e.g.*, race, color, religion, etc.).
10. Enter school property, or certain areas of school property, when otherwise restricted from entering the same.
11. Fail to promptly leave school property upon being directed to do so by school administration or law enforcement.
12. Possess, consume, sell, distribute or exchange alcoholic beverages, tobacco, vaping products, or illegal drugs.
13. Possess or use firearms or dangerous weapons, except in the case of law enforcement officers.
14. Gamble or encourage another or others to gamble.
15. Violate any applicable federal or state statute, local ordinance, or board policy.

If you have questions about this Code of Conduct, please refer to Board Policy 1.501, Visitors to the School), and/or contact central office using the following telephone number: 865-425-9002.

Range of Authority to Discipline

Behavior problems are dealt with using procedures and consequences that vary based on the age of the student, severity of the offense, and the frequency of the offenses. **Disciplinary procedures are not limited to those occurring on school campuses, but include all school-related activities and even non-school-related activities if the student's behavior is directly linked to school events.** The Tennessee State Law recognizes the right of school personnel to act in the place of the parent in situations where school personnel are responsible for the students.

Rights of the student

The principal or principal's designee at the building level administers disciplinary actions. Students referred for a disciplinary violation are entitled to explain their side of the story and to place their conduct in what they consider to be the proper context. This is done in an informal administrative conference prior to administering any disciplinary action (except in an emergency situation).

Tennessee Code Annotated (TCA 49-6-3401) gives a school principal or his designee the authority to suspend a student for various rule violations. When out of school suspension is used the principal/designee will generally meet with the parent to develop a plan of improvement upon re-entry of the student. A written plan of

improvement will be developed if the suspension exceeds five school days. Students and parents may from time to time disagree with the action taken by the principal. The procedure to be followed when such a disagreement occurs is outlined in the “Rights to Reviews and Appeals” section of this handbook.

Oak Ridge Board of Education Expectations

The Oak Ridge Schools Board of Education has established this handbook as policy and expects that parents and school staff will work in close cooperation to ensure student success, both academically and behaviorally. In order to achieve this goal, it is anticipated that staff and parents will communicate routinely, and definitely, whenever there is a concern regarding student progress. By establishing and maintaining close contact, parents and teachers can prevent or minimize discipline problems as well as maximize student growth.

Discipline Hearing Authority (DHA)

The Discipline Hearing Authority is a Board of Education designee. This means that the Oak Ridge Board of Education has established the Discipline Hearing Authority to **hear and rule on appeals related to student suspensions**.

The DHA is made up of Oak Ridge School staff who is not involved in the situation that resulted in the student being suspended from school. Members of the DHA for any specific student’s hearing would not be under the authority of the principal that suspended the student and are therefore able to be impartial in their judgment of the student’s behavior.

A DHA hearing is not open to public audiences like a Board of Education hearing would be. This gives the student and family more confidentiality and privacy in presenting their appeal. A parent or student may appeal (in writing and within five working days of receipt of a written DHA decision) the decision of the DHA to the Superintendent. However, upon review of the written record of the DHA hearing, the Superintendent may decide to simply affirm the DHA decision; or may lessen the discipline administered; or may decide to hear the case in an open Board of Education meeting. Appeals to the Board will be open meetings unless the parent/guardian has officially requested a closed meeting. In cases where the state law or Board of Education Policy requires “zero tolerance” for substantiated rule violations, the Superintendent of Schools has final authority over consequences to be administered on a case-by-case basis.

ATTENDANCE & ENROLLMENT

Under the Tennessee Compulsory School Attendance Law, all children between the ages of six and seventeen, both inclusive, are legally required to attend school (TCA 49- 6-3001). Students less than 6 years of age who have been enrolled in school for 6 weeks or more are subject to the same attendance regulations as other students of compulsory school age (TCA 49-6-3007). Students entering first grade are required to have completed a State-approved kindergarten program (TCA 49-6-201). Students not in school on any day for at least half the time for which they are enrolled will be considered absent for state reporting. This includes students not in school half the abbreviated day. Per 49-6-3007, after a child has five (5) unexcused absences without adequate excuse, their parent(s)/guardian(s) will receive a notice stating that the child’s attendance at school is required. Upon the next unexcused absence, a referral may be made to the Anderson County Juvenile Court and a Truancy petition may be issued. If after notice to the juvenile court is given, either the child or parent(s)/guardian(s) do not immediately conform to school attendance guidelines, additional referrals shall be made to either law enforcement, the Tennessee Department of Children’s Services, and/or the juvenile court where appropriate. The legal consequences issued by the Court for unlawful absences can result in criminal charges for educational neglect which is a Class C misdemeanor per TCA-49-6-3009 (amended). Parents can also be fined up to \$50.00 per day, given community service or be ordered to serve time in the county jail.

In collaboration with the Anderson County District Attorney's Office and the Oak Ridge Police Department, a truancy review support system is in place. Parents will be notified via phone calls, school personnel contact and US mail that their child has the potential of being petitioned to court for truancy and the parent could be prosecuted for educational neglect. Included in the appendices are the steps for reporting truancy by school personnel and the steps in place across the district.

Students are expected to:

- Be present and on time for all assigned classes (skipping classes will count as unexcused absences).
- Present documentation of parental permission before checking out of school. Class absences as a result of early checkout are considered the same as any other absence and are subject to all attendance policy rules.
- Provide a written excuse for each absence from his/her parent or custodial parent giving the date and reason for the absence(s).
- Make up assigned work missed during excused absences.

Excused Absences

Students must be in school unless the absence has been excused for one of the reasons listed below. It is the responsibility of each student's parent/guardian to explain the student's absence to the school in a manner satisfactory to the principal. Absences may be classified as either excused or unexcused as determined by the principal or his/her designee. Absences will only be excused for the following reasons:

1. Personal illness
 - a. Only seven days, whether consecutive or not can be excused by a parent note;
 - b. After a child has had (7) days, not necessarily consecutive, of illness related absences excused by a parent note, **any future illness related absence must have a doctor's note stating that the absence is medically necessary.**
 - c. All parent and doctor notes must be turned into the school within three school days of the child returning to school.
2. Death in the family
3. Religious observations
4. Extreme weather conditions
5. Court appearance or legal mandates
6. Verifiable family emergency
7. School sponsored events
8. Principal has discretion to excuse absences based on the following:
 - a. The absence must be prearranged
 - b. The absence must not have an adverse effect on the child's academic standing
 - c. The child must have a good attendance history
 - d. The child must have a good behavior record
 - e. The Director of Schools must agree
 - f.

Any absence that does not fit any of the criteria listed above will be considered unexcused. The criteria listed above will also apply to tardies and early dismissals.

A student is considered legally truant following **five (5)** cumulative unexcused absences (**TCA 49-6-3007**). The Board of Education may excuse children from compulsory attendance in accordance with guidelines developed by the State Board of Education (TCA 49-6- 3005). Students may be subject to withdrawal from Oak Ridge Schools after ten consecutive unexcused absences or fifteen unexcused absences during a semester (TCA 49-6-3017[c]). In cases of IEP students, the IEP team will convene to discuss appropriate options available.

Truancy

Students who are absent **five (5)** days without adequate excuse will be reported to the superintendent of schools or his/her designee who will, in turn, provide written notice to the parents/guardians of the student's absence. Skipping classes is also a form of truancy and will fall under the same consequences for unexcused absences. The legal consequences issued by the Court for unlawful absences can range from zero to the child being placed in the custody of the Tennessee Department of Children's Services with the parents paying child support to the State. The parents can also be fined up to \$50.00 per day, given community service be ordered to serve time in the county jail or be criminally charged with a Class C misdemeanor for educational neglect.

Truancy Reporting Steps:

Step One – Parent/Guardian will receive an automated phone message informing them that their child has accumulated 3 unexcused absences.

Step Two – Once a student accumulates 5 unexcused absences, the following interventions will be implemented:

1. Parent/Guardian will receive an automated phone message.
2. Parent/Guardian will be mailed a letter regarding student attendance expectations from General David Clark, Anderson County District Attorney.
3. Parent/Guardian and the student will receive an invitation to meet with the school Truancy Intervention Team to complete an attendance contract.
4. Student attendance will be monitored the remainder of the school year.

Step Three – Once a student has accumulated 7 unexcused absences, the following interventions will take place:

1. School staff will contact parents/guardians to inform them that their child has accumulated 7 unexcused absences.
2. The Director of Pupil Services will send a written notice directing parents/guardians and the student to attend a Truancy Review and Support Meeting.
3. Parents/Guardians choosing to attend the Truancy Review and Support Meetings will have the opportunity to participate in a Diversion Program. Maintaining compliance with the terms of the Diversion will allow the parent to avoid having a truancy petition filed against their child as well as the possibility of an educational neglect charge against them.
4. Parent/Guardians electing not to attend the Truancy Review and Support Meeting risk the possibility of being referred for legal interventions.
5. The School Truancy Team will complete the Attendance Assessment to determine barriers and needed support to promote acceptable school attendance.

Step Four – Once a student has accumulated 10 unexcused absences, the following actions will take place:

1. The Director of Pupil Services and the School Truancy Team will continue monitoring attendance.
2. If the student continues to accumulate unexcused absences, the School Truancy Intervention Team will complete the Truancy Referral Form (A) and recommend one of the listed interventions to the Director of Pupil Service and the Executive Director of School Leadership
 - a. Continue to provide student support and monitor attendance
 - b. File a truancy petition against the student
 - c. Charge the parent or guardian with educational neglect
3. The Director of Pupil Services will then complete the Truancy Referral Form (B) and determine which of the above interventions are most appropriate.

Step Five – If it is determined legal interventions are appropriate, the Director of Pupil Services will submit a completed Truancy Referral Packet to the School Resource Officer who will the appropriate legal action.

BEHAVIOR & DISCIPLINE PROCESS

Oak Ridge Schools in accordance with School Board policy 6.300 will make every effort to utilize trauma informed and restorative discipline practices to encourage positive student behavior. A Tiered system of behaviors has been adopted by this policy- see section titled Levels of Misbehavior for more information. Certain behaviors will result in suspensions and or/expulsions. Students may be suspended short term (less than ten days), long term (ten days or more) or expelled (no less than one calendar year) from school for unacceptable behavior as outlined in this booklet. Unacceptable behavior is defined as behavior that is in violation of city or state laws and/or school rules.

Principals have the authority to suspend students from school attendance, including its sponsored activities, and/or from riding a school bus (T.C.A. 49-6-3401).

In addition, some school rule violations always require expulsion under state law (T.C.A 49-6-3401 and 49-6-4216). These violations are referred to as “zero-tolerance violations and are:

- Possession of a firearm on school property/activity
- Possession/use/sale of drugs on school property/activity
- Battery on a staff member
- Making a threat to use a bomb, dynamite or any other deadly or destructive device, including chemical weapons, on school property or at a school sponsored event.
- Threats of mass violence
- Electronic threat to cause bodily injury or death to another student of school employee

Depending on the seriousness of the offense, the Board of Education has extended the discipline **option** of expulsion for a first offense to include:

- Alcohol possession/use or distribution on school property or at a school activity
- Alcohol or drug use prior to accessing school property/activity (under the influence)
- Battery on peers; other than mutual combat
- Use of any device as a weapon to intentionally harm another or threaten harm
- Possession of any items defined as weapons in this handbook

Students confirmed of committing the following actions will not be eligible to attend the Secret City Academy for in person instruction:

1. Possession of a firearm on school property/Activity.
2. Battery on a staff member.
3. Intentional or unprovoked assault or battery on a student.
4. Making a threat to use a bomb, dynamite, or any other deadly or destructive device, including chemical weapons, on school property or at a school sponsored event.
5. Possession of drugs with the intent to distribute or sale.
6. A student whose presence creates an unreasonable safety concern.

These students will have the option of participating in an on-line program until their suspension or expulsion has ended.

LEVELS OF MISBEHAVIOR AND DISCIPLINARY OPTIONS

This section identifies levels of misbehavior, the disciplinary procedure typically used to address a specific category of misbehavior, and the discipline options available to a teacher and/or principal for the various types of misbehavior. The following levels, procedures, and options are designed to protect all members of the

educational community in the exercise of their rights and duties. The district shall utilize trauma-informed discipline practices. (School Board Policy 6.300).

MISBEHAVIORS: Level I

Level I rule violations are minor misbehavior on the part of the student which impedes orderly classroom procedures or interferes with the orderly operation of the school, but which can usually be handled by an individual staff member.

Examples (not an exclusive listing):

Classroom disturbances; Classroom tardiness; Cheating and lying; Use of inappropriate language (non-directed, first offense, inadvertent); Non-defiant failure to do assignments or carry out directions; Teasing of a peer; possession of unauthorized personal communication devices and dress code violations.

Disciplinary Procedures Generally Followed:

- Immediate intervention by the staff member.
- Determine what offense was committed and its severity.
- Determine that the student understands the nature of the offense and has an opportunity to explain his/her behavior.
- Employ appropriate disciplinary options.
- Record of the offense and disciplinary action maintained by staff member.
- Confiscation of unauthorized electronic device.
- Refer to school counselor

Disciplinary Options:

Verbal reprimand; Special assignment; Restricting activities; Assigning work details; Counseling; Withdrawal of privileges; Issuance of demerits which might affect citizenship or department grades; Strict supervised study; Detention; and/or In-school suspension.

MISBEHAVIORS: Level II

Misbehavior where frequency or seriousness tends to disrupt the learning climate of the school. Included in this level are misbehaviors, which do not represent a direct threat to the health and safety of others, but where educational consequences are serious enough to require corrective action on the part of administrative personnel.

Examples (not an exclusive listing):

Continuation of unmodified Level I behaviors; Tardy to school; Using forged notes or excuses; Disruptive classroom behavior; Teasing with intent to embarrass; stealing, possession of unauthorized personal communication devices, gambling, fighting, skipping class, and inappropriate access of Internet sites, e- mail services or secured files

Disciplinary Procedures:

- Immediate intervention by staff members.
- Student is referred to principal for appropriate disciplinary action.
- Principal/designee meets with student and teacher.
- Principal/designee hears report/referral made by teacher, permits student the opportunity of explaining his/her behavior, denying it or explaining any mitigating circumstances.
- Principal/designee takes appropriate disciplinary action and notifies teacher of action.
- Record of offense and disciplinary action maintained by principal.
- Parent notified of situation and the action taken.

Disciplinary Options Available to staff:

Modified probation; Behavior Modification; Social probation; Peer counseling; Referral to outside agency; In-school suspension; Transfer from class; Detention; Suspension from school-sponsored activities or from riding school bus; Restricting school-related honors/privileges student is otherwise due; Truancy Review Board, Truancy Court; and/or Out-of-school suspension not to exceed ten (10) days.

MISBEHAVIORS: Level III

Acts directly against persons or property but where consequences *do not seriously endanger* the health or safety of others in the school.

Examples (not an exclusive listing):

Continuation of unmodified Level I and II behaviors; Fighting (simple); Vandalism (minor); Stealing; Cheating; Computer misuse; Threats to others; General allegation of a peer; and Directed profanity at a staff member (automatic five (5) day suspension first offense)

Disciplinary Procedures:

- Immediate intervention by staff members.
- Law enforcement may be contacted if deemed appropriate and possible arrest may result
- Student is referred to principal for appropriate disciplinary action.
- Principal/Designee meets with student and staff member.
- Principal/Designee hears report/referral and permits student the opportunity of explaining conduct.

Principal/Designee takes appropriate disciplinary action:

- If student's program is to be changed, adequate notice shall be given to the student and his/her parents of the charges against him, his/her right to appear at a hearing and to be represented by a person of his/her choosing
- A change in school placement may be appealed.
- Record of offense and disciplinary action maintained by principal.
- Parent notified of situation and the action taken.
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Disciplinary Options:

In-school suspension; Detention; Restitution for lost, damaged or stolen property; Out- of-school suspension not to exceed ten (10) days; Mandatory tutorial sessions outside the regular school day; Social adjustment/skill building classes; Transfer from class; and/or Long-term out-of-school suspension for more than 10 days; Participation at parent expense in a specific behavior modification program.

MISBEHAVIORS: Level IV

Acts which result in violence to another's person or property, or which *pose a threat* to the safety of others in the school, or substantially disrupt the learning environment. These acts are so serious that they usually require administrative actions, which result in the immediate removal of the student from the school, the intervention of law enforcement authorities and/or long-term removal from the school.

Examples (not an exclusive listing):

Unmodified Level III behaviors; Felony charges of criminal activity within the community which, because of the nature of the charge, has a high probability of disrupting the learning environment; Threat of mass violence on school property or at a school-related activity*, Extortion; Bomb Threat; Possession/use/transfer of dangerous weapons*; possession/use/or transfer of weapons or look-alike weapons on or around a school campus or a school activity; participation in any activity within the community that provokes campus unrest; Assault; Battery; Vandalism; Theft/possession/sale of stolen property; Arson; Possession of unauthorized substances (drugs and

other controlled substances)*; Use/transfer of unauthorized substances; Sexual allegation/Ethnic allegation/Tormenting of a peer/Hazing; Serious breach of conduct; Trespassing; Making false accusations about a staff member; Electronic threat to cause bodily injury or death to another student of school employee*

Disciplinary Procedures:

- Immediate action by staff prudent to a given situation (School Resource Officer [SRO] may be involved at this point).
- Principal confers with appropriate staff members and with the student.
- Principal hears staff report/referral and permits student opportunity of explaining conduct. Parents are notified.
- Law enforcement officials are contacted and possible arrest may result (unless SRO is already involved).
- Incident is reported and recommendations made to the Superintendent of Schools.
- Complete and accurate reports are submitted to the Superintendent of Schools.
- Student is given hearing before Discipline Hearing Authority.

Disciplinary Options:

Out-of-school suspension; Expulsion; Alternative school; Other Discipline Hearing Authority or Board action which results in appropriate placement; Required to attend a related skill building program and/or Suspension for a period of not less than one (1) calendar year subject to modification by the Superintendent of Schools on a case-by- case basis.

*Zero Tolerance Offenses

Zero Tolerance (T.C.A. 49-6-3401)

Some school rule violations always require expulsion under state law. These violations are referred to as “zero tolerance” violations and are:

- Possession of a firearm on school property/activity
- Possession/sale of drugs on school property/activity
- Battery on a staff member
- Making a threat to use a bomb, dynamite or any other deadly or destructive device, including chemical weapons, on school property or at a school sponsored event.
- Threats of mass violence
- Electronic threat to cause bodily injury or death to another student of school employee

Depending on the seriousness of the offense, the Board of Education has extended the discipline **option** of expulsion for a first offense to include:

- Alcohol possession/use or distribution on school property or at a school activity
- Alcohol or drug use prior to accessing school property/activity (under the influence)
- Battery on peers; other than mutual combat
- Use of any device as a weapon to intentionally harm another or threaten harm
- Possession of any items defined as weapons in this handbook

BULLYING, HARASSMENT, HAZING

Bullying

It is the policy of the Oak Ridge Schools to maintain a learning environment that is free from allegation and bullying due to a student's race, color, sex, sexual orientation, gender identity, national origin or disability. The Oak Ridge Schools prohibits all forms of bullying, including cyber bullying and harassment (Board Policy 6.204)

It is a violation of state and district policy for any student, teacher, administrator or other school personnel of this district to bully or tolerate bullying as defined by this policy (TCA 49-6-4503). **Bullying** is defined as any act that substantially interferes with a student's educational benefits, opportunities or performance, takes place on school grounds, at any school-sponsored activity, on school provided transportation, or at any official school bus stop, and that has the effect of (1) physically harming a student or damaging a student's property; (2) knowingly placing a student in reasonable fear of physical harm to the student or damage to the student's property; or (3) creating a hostile educational environment. Behavior of this nature may result in the following but is not limited to, disciplinary actions per school board policy:

- **Two days in school suspension and parent conference held**
- **Two days out of school suspension and parent conference held**
- **Five days out of school suspension**
- **Ten days out of school suspension and referral to Disciplinary Hearing Authority**

Any continued bullying behavior will be subject to expulsion.

The school system will act to promptly investigate all complaints, formal or informal, verbal or written for alleged incidents of bullying. Bullying/Allegation forms are available in each school office and is also located in the back of the handbook. The form should be completed by the student and given to the school administrator or building designee. The school will follow up by conducting an investigation and submitting a copy of the final disposition to the Executive Director of Student Services.

Cyberbullying

Cyberbullying is the use of cell phones, instant messaging, e-mail, chat rooms, social networking sites or other type of digital technology to harass, threaten, discriminate or intimidate others. If a student receives a text, email, blog, comment, social network post or message via other Web 2.0 tool that makes them feel uncomfortable or is not respectable, they must follow the steps mentioned above to report the incident to the school administrator or building designee and must not respond to comment.

Harassment

No student shall commit any act that injures, degrades, threatens or disgraces others. Students perceiving harassment must report each occurrence to a teacher, a school counselor or administrator. Forms for reporting allegations of harassment are available in the school office and should be completed by the student, parent or guardian and given to the school administrator or designee. This is a formal procedure and a record of all grievances must be maintained by the Department of Student Services or Human Resources (whichever department is appropriate).

Students, parents, and staff are expected to report occurrences of perceived discrimination or harassment to a school counselor or building administrator. Harassment of another student will not be tolerated. Behavior of this nature may result in the following but is not limited to, the disciplinary actions per school board policy:

- **Two days in school suspension and parent conference held**
- **Two days out of school suspension and parent conference held**
- **Five days out of school suspension**
- **Ten days out of school suspension and referral to Disciplinary Hearing Authority**

Any continued harassment behavior will be subject to expulsion.

Sexual Harassment

In order to maintain a safe, civil, and supportive learning environment, all forms of sexual harassment and discrimination on the basis of sex are prohibited. ([Board Policy 6.3041](#)). Any individual who has knowledge of behaviors that may constitute a violation of this policy shall immediately report such information to the Title IX Coordinator, however, nothing in this policy requires a complainant to either report or file a formal complaint within a certain timeframe. If the complaint involves the Title IX Coordinator, the complaint shall be filed with the Director of Schools.

Hazing

Hazing by any person or organization sanctioned by the Oak Ridge School System is prohibited by the board of education pursuant to T.C.A. 49-2-120.

“Hazing” means any intentional or reckless act in Tennessee, on or off Oak Ridge Schools property, by one (1) student acting alone or with others which is directed against any other student, that endangers the mental or physical health or safety of that student, or which induces or coerces a student to endanger such student’s mental or physical health or safety. **“Hazing”** does not include customary athletic events or similar contests or competitions and is limited to those actions taken and situations created in connection with initiation into or affiliation with any organization (TCA 49-2- 120).

VIOLENCE, WEAPONS, THREATS OF VIOLENCE

Threats of Violence

Per TCA 49-6-3401, a threat is defined as: school threat (threat of harm or destruction); any threat (verbal, written or electronic) by a person to use other substances or devices for the purpose of exploding, burning, causing damage to a school building or school property or to harm students or staff; intentionally making a false report of potential harm from a bomb, dynamite, explosive or arson-causing device; gang-related or hate- related. Threats will be investigated by school staff and may result in possible disciplinary actions.

Violence

Violence or threatened violence against anyone attending or assigned to a public school is against the law (TCA 49-6-3401). Mutual combat between students will generally be disciplined as follows:

- **1st Offense - Up to 5 days out-of-school suspension.**
- **2nd Offense - Up to 10 days out-of-school suspension and enrollment in anger management class at parent's expense.**
- **3rd Offense - Recommendation for expulsion.**

Students encouraging fighting will be subject to the same discipline as combatants.

Acts of battery, physical intimidation and/or aggression may be reported to law enforcement. Battery is sufficient reason for expulsion on a first offense. Fighting involving more than two students will be sufficient reason for expulsion on the first offense. Retaliation against students cooperating with school administration is subject to expulsion on a first offense. Physical aggression (contact) towards a staff member will result in an expulsion on the first offense.

Given the events that have occurred throughout the United States involving students using firearms on their peers, the school staffs have been directed to investigate any student making “death threat” statements to determine the seriousness of the threat. The student may be suspended or excluded from school while the potential for “real harm” is evaluated. In some cases, student will need to undergo a mental health assessment at parent expense.

Weapons

The possession of legally defined weapons or any instrument used as a weapon (including look-a-likes), whether on a person or in his/her locker or vehicle, is prohibited. It is a violation of state law for any person to possess or carry, whether openly or concealed a weapon on school property. Weapons are defined as firearms, knives exceeding a specified blade length, explosives, blackjacks, knuckles, clubs, BB guns, pellet guns, a sharp pointed or edged instrument, or any other device capable of harming an individual. A weapon (or an item perceived as a weapon by school authorities) will be given to the police. All students using or possessing a weapon will be reported to the police. **Any item deemed a weapon per consultation with the police will result in the appropriate disciplinary consequence (i.e. pepper gas, electrical weapons, possession or use of fireworks or incendiary devices).**

A violation of this law is a felony with a maximum penalty of six (6) years' imprisonment and a fine not to exceed three thousand dollars (\$3,000). (TCA 39-17-1302 and, TCA 39-17-1309) Individuals violating this law are subject to prosecution

Carrying weapons on school property

Possession of a "weapon-knife" (butterfly, switchblade, hunting knife, large pocket knife, etc.) concealed or openly with the intent to go armed is a violation of 39-17-1309 (2) will be subject to expulsion. Violation of this subsection is a Class E felony. Use of any knife in relationship to a threat of harm or actual injury will result in expulsion. Students who bring or use a firearm in school buildings, on school grounds or at school- sponsored events will be expelled for a period of not less than one year (TCA 49-6- 3401) (U.S.C. Code 18-921).

A principal or teacher who has reasonable suspicion to believe a student is in possession of a weapon at school in violation of TCA 39-17-1307, 39-17-1309, 49-6- 4209 or of title 39, chapter 17; part 4 is required to report such suspicion to the appropriate authorities.

The policy of the Oak Ridge Schools is to suspend students for no less than 2 days for possession of a simple pocket-knife.

Student with knowledge of a Zero Tolerance Weapon Offense at school

Any student with direct knowledge of a weapon on school property that fails to immediately report this safety concern to school staff, or an SRO will be **suspended out of school for a period of not less than 10 days and possible expulsion.**

DRUGS, ALCOHOL, TOBACCO, VAPING

According to the United States Department of Education (DOE), “the use of alcohol... and other illicit drugs undermines students’ ability to achieve academically, is associated with other harmful behaviors, and is incompatible with a school climate of respect, safety, and support for learning.” In fact, according to the DOE, “students who are disengaged in school are more likely to be users.” “Alcohol is by far the substance most abused by students... [and,] among illicit drugs, marijuana is by far the most commonly used by young people.”

Similarly, the Centers for Disease Control and Prevention (CDC) details that “15% of high school students reported having ever used select illicit or injection drugs.” Further, the CDC notes that such “drug use is associated with sexual risk behavior, experience of violence, and mental health and suicide risks.” And the Food and Drug Administration (FDA) confirms that the adverse effects of drugs can include over the counter products

such as delta-8 THC, as national poison control centers received thousands of exposure cases of delta-8 THC products from early 2021 through early 2022 (41% of which involved pediatric patients less than 18 years of age).

The Board recognizes the above-issues and concerns, and, in turn, wishes to apply the following disciplinary procedures in situations involving and/or in any way relating to students with drugs and/or alcohol:

Disciplinary Procedures

- The principal confers with appropriate staff members and with the student.
- The principal hears the accusations and allows the student the opportunity to explain his/her conduct.
- The parent(s)/guardian(s) are notified.
- Law enforcement officials are contacted.
- The incident is reported, and recommendations are made to the Director of Schools.
- If the student's placement is to be changed, adequate notice of the charges shall be given to the student and his/her parent(s)/guardian(s) and his/her right to appear at a hearing.

Disciplinary Actions are outlined according to substance below.

Depending on the seriousness of the offense, the Board of Education has extended the discipline **option** of expulsion for a first offense to include:

- Alcohol possession/use or distribution on school property or at a school activity
- Alcohol or drug use prior to accessing school property/activity (under the influence)

Alcohol Violations

Examples: Use, possession, sale, distribution, and/or being under the influence of alcohol.

- **1st Offense (within a school year): Assignment to an alternative school or program for a 90-school day placement.** After completing 90 school days in an alternative school or program, the student and/or his/her guardians may request, through the Director of Schools, re-admittance to a regular school program. The Director may reduce the alternative placement period at his/her discretion, or upon a report from alternative school/program personnel that the student has consistently behaved well and made consistent academic efforts.
- **2nd Offense (within a school year) – Expulsion for a calendar year.**

Non-Narcotic Violations (CBD, HHC, Delta-8, Hemp-derived THC etc.)

Use, possession, sale, or distribution of drug paraphernalia, including, but not limited to, vape pens/products used with or associated with evidence of CBD, HHC or Delta 8 products; OR Use and/or being under the influence of products containing or marketed as containing any level THC and/or CBD (for controlled substance possession, see LEVEL II below).

- **1st Offense (within a school year): Assignment to an alternative school or program for a 90-school day placement.** After completing 90 school days in an alternative school or program, the student and/or his/her guardians may request, through the Director of Schools, re-admittance to a regular school program. The Director may reduce the alternative placement period at his/her discretion, or upon a report from alternative school/program personnel that the student has consistently behaved well and made consistent academic efforts.
- **2nd Offense (within a school year) – Expulsion for a calendar year.**

Narcotic Violations (Delta-9 THC, Controlled Substances, Legend Drugs) - Zero Tolerance

Example: Unlawful possession of any controlled substance, Delta-9 THC, controlled substance analogue, or legend drug, which could include the sale and/or distribution of such a drug on school grounds or at a school-sponsored event.

- Pursuant to Tennessee law (Tenn. Code Ann. Section 49-6-4002), committing such an offense shall result in the student being **expelled from the regular school program for at least one (1) calendar year**, unless modified by the Director of Schools. Modification of the length of time shall be granted on a case-by-case basis. Students that commit zero tolerance offenses may also be assigned to an alternative school or program at the discretion of the Director of Schools.

Drug Paraphernalia

It is unlawful to use, possess with the intent to use or to promote the sale of drug paraphernalia (T.C.A. 39-17-425). Such possession or use may be treated similarly to the possession or use of drugs at school.

Drug Testing

Principals are authorized to order drug tests for individual students when there is reasonable cause. Prior to performing a drug test on a student based on reasonable suspicion, certain conditions must be met. These conditions are listed in 6.3071 of the Oak Ridge School Board policy listed on the last 3 pages in this handbook. Students involved in any voluntary extracurricular activities shall be subject to random drug tests. Parents and students will be informed of this policy prior to participation and shall sign a contract to the drug testing and a release of information as a condition of participation.

Extracurricular activity is defined as voluntary participation in activities not falling within the scope of regular curriculum and carrying no academic credit. This includes participating in athletic programs, cheerleading, bands, clubs, student leadership positions etc.

Tobacco

Smoking or the possession or use of any tobacco product including smokeless tobacco and electronic cigarettes in school buildings, on school premises, or at school-related activities is prohibited. (BEP SEC. I-5, TCA 39-17-1601 and school board policy 1.803) Students who are found in possession of tobacco or tobacco products including smokeless tobacco, and electronic cigarettes will be issued a tobacco citation for a court hearing. (T.C.A. 39-17-1505). Electronic cigarettes mean an electronic device that converts nicotine into a vapor that is inhaled by the user. Nicotine vapors or oils will be considered as paraphernalia for electronic cigarettes. All uses of tobacco including electronic/battery operated nicotine delivery devices, vapor products, and all other associated paraphernalia are prohibited in all school district buildings and vehicles that are owned, leased, or operated by the district. Smoking and vaping shall be prohibited in any public seating areas including, but not limited to, bleachers used for sporting events or public restrooms. (School Board policy 1.803)

Students who are vaping or found to be in possession of tobacco or tobacco products on school property including smokeless tobacco, and electronic cigarettes, will be assigned the following consequences:

- **First Offense** – Student will be assigned two days of out of school suspension, receive a tobacco citation and be required to attend a tobacco/vaping education class.
- **Second Offense** – Student will be assigned three days of out of school suspension.
- **Third Offense** – Student will be assigned five days of out of school suspension.
- **Fourth Offense** – Student will be assigned a long-term suspension (10 days or more).

Students who are found to be distributing tobacco or tobacco products, including smokeless tobacco and electronic cigarettes, will be assigned the following consequences:

- **First Offense** – Student will be assigned seven days of out of school suspension, receive a tobacco citation and be required to attend a tobacco/vaping education class.
- **Second Offense** – Student will be assigned a long-term suspension (10 days or more).

Vaping

Tobacco

See previous section listing disciplinary action for [Tobacco](#) Products

Non-Tobacco Vape

Refer to [Non-Narcotic \(CBD, HHC, Delta-8\)](#) or [Narcotic \(Delta-9 THC, Controlled Substances\)](#) Substance violations, depending on the content of the vape.

MISCELLANEOUS TERMS & OFFENSES

This section attempts to define terms commonly used by school staff. It is also believed that this section will further explain potential consequences or actions that may occur for specific types of rule violations. These terms are arranged in alphabetical order.

Abusive Language

Use of vulgar, profane, or threatening language on any school property including buses or at any school event is prohibited. See School Conduct for consequences.

Appeal

A grievance procedure for administrative decisions.

Debt to School

Any student who incurs a school debt may be denied a grade card, diploma, and certificate of progress or transcript until restitution is made (TCA 49-1-302(a)(12)).

However, a child with a disability shall not be denied a copy of his/her educational record, including but not limited to grade cards, diplomas, transcripts, IEPs, progress reports, etc. notwithstanding the student's outstanding school debts.

Discrimination

In compliance with equal opportunity legislation, the Oak Ridge Schools does not discriminate nor deny any student's participation in any program or activity on the basis of gender, race, color, religion, ethnicity, national origin, sexual orientation, gender identity or disability. Students or parents believing specific acts of discrimination are occurring should contact the school principal for the grievance procedures. This is a formal procedure and a record of all grievances must be maintained by the Department of Pupil Services for all students or Human Resources for all employees. Students, parents, and staff are expected to report occurrences of perceived discrimination or harassment to a school counselor or building administrator, or Oak Ridge School staff.

Dress Code

The Board of Education believes that appropriate dress and grooming contribute to a productive learning environment. The Board expects students to give proper attention to personal cleanliness and to wear suitable clothing. Students are asked to wear simple, comfortable clothing that is clean and neat. Shoes should be worn at all times. Generally speaking, students are not to wear clothing which compromises safety or modesty; nor clothing which is disruptive to the educational process. Students are prohibited from wearing:

1. Clothing or accessories which by reasonable judgment is considered unsafe, dangerous or a health hazard (examples include, but are not limited to: wallet chains, spiked collars, necklaces or rings with spikes or sharp edges, oversized belt buckles, picks and combs).
2. Clothing or accessories which contain or suggest obscene symbols, signs, slogans or words degrading any gender, cultural, religious or ethnic values.
3. Clothing or accessories which contain or suggest language or symbols oriented toward violence, vandalism, sex, drugs, alcohol or tobacco.
4. Pajamas or clothing resembling sleepwear. This also includes house shoes.
5. Apparel
 - a. Shirts, shorts, jeans or pants with holes, skirts and dresses that compromise modesty or are disruptive to the learning environment.
 - b. The following attire is not permitted: bare midriffs; halter or tube tops; short shorts; tight, see through, or revealing clothing; or clothing which allows underwear to be exposed, such as sagging pants, spaghetti strap tops, tank tops, sports bras, and muscle shirts.
 - c. A belt is mandatory if pants or shorts will not stay at the waist without one.
 - d. Hats, head coverings, bandanas, and sunglasses are not to be worn inside the school building unless for religious purposes.
6. Any articles which can be related to gang activity such as: items with gang names; gang initials; or individual gang member monikers; gang related jewelry; gang related tattoos; or self-inflicted scars. (TCA 49-6- 4215)
7. Any manner of grooming, which by its color, arrangement, trademark, or any other attribute that is gang related. This may include such items as shoelaces, belt buckles, hats or tattoos.
8. All students must wear shoes. It is strongly suggested that students wear shoes which either enclose the foot or are secured with heel straps. Flip flops are not allowed in grades PreK-4.
9. Heavy coats must be removed upon arrival at school, be placed in lockers and left there until the student leaves the building. (At campuses that have multiple buildings that require outside travel between classes, the principal may exercise discretion.)

The school building administrator may make exceptions to dress requirements to accommodate the special needs of classes (examples include but are not limited to: science labs, welding, cooking labs) and/or certain sports/activities.

All students are expected to comply with the general dress code policy of the Oak Ridge School Board. Students who fail to comply with the Dress Code Policy shall be advised of the policy and offered the opportunity to take corrective action. The School shall attempt to contact the student's parents. Students who repeatedly fail to dress in accordance with the Dress Code Policy may be subject to disciplinary actions as set forth in the Oak Ridge Schools Discipline Code. The Administration reserves the right to judge what is appropriate or not.

Driver's License

Any student between the ages of 15 and 18 making application for a driver's permit or license must be enrolled in school or meet other special requirements of the law. To obtain a driver's license or permit a student must have thirty (30) consecutive days of attendance without unexcused absences.

To maintain a driver's license, students must be enrolled in school. According to TCA 55-10-701, students between the ages of 13 and 18 found guilty (in juvenile or adult court) of using alcohol or controlled substances shall be denied a Tennessee driver's license.

When a student, under the age of 18, drops out of school, his/her name will also be forwarded to the Department of Safety resulting in the loss of the license. Withdrawal from school is defined as 10 consecutive days of

unexcused absences, or 15 days of unexcused absences within a single semester, or notification of withdrawal. (Public Chapter No. 763 and TCA 49-6-3017)

Extortion

It is against the law for anyone to threaten, harm, or restrict the freedom or action of another person in order to obtain property or services of that person (TCA-39-14-112). This behavior is subject to suspension on the first offense.

Felony Charge

Any student charged with a felony for off-campus criminal behavior, whose presence in school poses a danger to persons or property or disrupts the educational process, is subject to suspension (TCA 49-6-3401).

Fighting (see Violence)

Fireworks

The possession, sale or use of any fireworks on school grounds is in violation of the law (TCA 68-104-112). The discharge of fireworks in or around the school setting may result in suspension.

Gambling

It is against the law to knowingly engage in gambling (TCA 39-17-502) or games of chance for money and/or other articles of value.

Homework and Class Assignments

Students are expected to complete class assignments and those who fail to do so may be expected to attend help sessions, if available. Students failing at grading periods, who are not routinely accessing help sessions, will be subject to mandatory assignment to tutoring sessions. Failure to attend mandatory tutoring sessions will be subject to discipline up to and including suspension.

Homebound

Homebound services may be available for students who meet the criteria listed below:

1. **Short term illness** preventing attendance to school
2. Documentation from a licensed, treating medical physician supporting the need for the homebound service.
3. Students must remain in attendance at their school until the information listed above has been received and approved. Parents will be notified of the status of the Homebound application by the Health Services Coordinator/Pupil Services.

Profanity (Directed at Staff Member)

Students who use profane, vulgar, abusive language or display other forms of flagrant disrespect toward staff members will generally be disciplined as follows:

- **1st Offense - Up to 5 days out-of-school suspension.**
- **2nd Offense - Up to 10 days out-of-school suspension.**
- **3rd Offense - Long-term suspension (beyond 10 days).**

Depending on the severity of the behavior, a principal may invoke any of the above consequences as well as other disciplinary measures on the first offense.

Search

When individual circumstances dictate, a principal may order a search of a student, his/her possessions, book bags, containers, packages, locker or vehicle located on school property (TCA 49-6-4204). Students are

responsible for items found stored in their assigned locker. **Students shall not share a school locker and should ensure the locker is secure/locked at all times.** Items found in a locker will be considered the property of the individual student assigned the locker. Items found in the student's possession or in his/her belongings will be considered the property of the individual student.

Theft (Robbery)

It is unlawful for anyone to take property from another person by force, fear or without that person's consent (TCA 39-13-401, and TCA 39-14-103). Any student found guilty of theft may be suspended from school and in certain instances may be considered for either long-term suspension or expulsion. Any student who takes school property may also be denied a report card, diploma, certificate of progress, transcript, or schedule until restitution is made (TCA 49-1-302-15).

When students find lost or misplaced property they are required to promptly present such property to school authorities. Students found in possession of others' lost or misplaced property will be required to provide convincing evidence that such property was not stolen.

Trespassing and Loitering

It is illegal to be on any public school property during the day or night without lawful authority or after having been asked to leave the premises by school personnel (TCA 49-6-2008).

Vandalism and/or Destruction of Property

In cases of willful or malicious damage to a person's or the school's property, the policy of the Oak Ridge Schools will be to seek full restitution from those persons responsible for such acts. Where necessary, the Superintendent of Schools or his designee, with the approval of the Chairman of the Board of Education, will institute civil court action to recover damages and may also refer the matter to law enforcement. In Tennessee, parents may be held liable for damages committed by their children until eighteen (18) years of age (BEP Sec. III-17 and 20).

REQUIRED FEDERAL AND STATE NOTICES

Asbestos Management Plans

Parent(s)/guardian(s), upon request, shall be given the opportunity to review the Asbestos Management Plan. The Management Plan, which includes previous asbestos abatement projects, six months surveillance reports, the location and condition of the remaining asbestos containing materials in our buildings, as well as the response action chosen for each, is available for your review at the following location:

Mr. Allen Thacker, Asbestos Coordinator

Oak Ridge Schools
Maintenance Department
100 Woodbury Lane
Oak Ridge, TN 37830
865-425-3171

This written annual notification is required by AHERA regulations.

Child Nutrition Program

In the operation of the child nutrition program, no student will be discriminated against because of race, sex, color, national origin, age, or disability. A student enrolled in the District may be eligible for free or reduced-price meals and/or free milk based on the following criteria:

- All children in households receiving benefits from the Supplemental Nutrition Assistance Program (SNAP) or Families First can get free meals regardless of your income.
- Foster children that are under the legal responsibility of a foster care agency or court are eligible for free meals.
- Children participating in their school's Head Start program are eligible for free meals.
- If your household's income is within the limits on the Federal Income Eligibility Guidelines chart below.

More details regarding eligibility can be found at www.ortn.edu/district/food-services

Students identified as foster care, homeless, migrant, or runaway are categorically eligible for free meals and free milk.

We encourage every family to complete an application to apply for Free or reduced priced lunch. Applications are provided to all students digitally at the beginning of the school year and are available throughout the year at your school's front office or online through ParentSquare.

An application for free or reduced-price meals cannot be approved unless it contains complete information. All information provided on the application may be verified at any time during the school year.

For more information as to the free or reduced-price meals or for questions as to the appeal process due to an application denial, contact:

Marcia Wade

Coordinated School Health Coordinator

mkwade@ortn.edu - (865) 425-9028

Family Educational Rights and Privacy Act (FERPA) (20 USC 1232g)

As authorized by the Family Education Rights and Privacy Act (FERPA), the Oak Ridge Schools reserves the right to disclose information without parental consent about students to school officials with legitimate educational interests, including School Resource Officers.

The Family Educational Rights and Privacy Act (FERPA) afford parents and students over 18 years of age ("eligible students") certain rights with respect to the student's education records. They are:

1. The right to inspect and review the student's education records within 45 days of the day the school system receives a request for access. Parents or eligible students should submit to the school principal [or appropriate school official] a written request that identifies the record(s) they wish to inspect. The principal will make arrangements for access and notify the parent or eligible student of the time and place where the records may be inspected. Parents may request a copy of records for a fee of 10 cents per page.
2. The right to request the amendment of the student's education records that the parent or eligible student believes is inaccurate or misleading.

Parents or eligible students may ask the Oak Ridge Schools to amend their record. They should write the school principal, clearly identify the part of the record they want changed, and specify why it is inaccurate or misleading.

If the school system decides not to amend the record as requested by the parent or eligible student, the school system will notify the parent or eligible student of the decision and advise them of their right to a hearing regarding the request for amendment. Additional information regarding the hearing procedures will be provided to the parent or eligible student when notified of the right to a hearing.

3. The right to consent or not to consent to disclosures of personally identifiable information contained in the student's education records, except to the extent that FERPA authorized disclosure without consent. One exception, which permits disclosure without consent is disclosure to the school officials with legitimate educational interests.
4. A school official is a person employed by the school system as an administrator, supervisor, instructor, or support staff member (including health or medical staff and law enforcement unit personnel); a person serving on the School Board; a person or company with whom the school system has contracted to perform a special task (such as an attorney, auditor, Food Services, medical consultant, transportation or therapist); or a parent or student serving on an official committee, such as a disciplinary or grievance committee, or assisting another school official in performing his or her tasks. A school official has a legitimate educational interest if the official needs to review an education record in order to fulfill his or her professional responsibility.
5. Upon request, the Oak Ridge Schools will disclose education records without parental consent to officials of another school district in which a student seeks or intends to enroll.
 - a. The right to file a complaint with the U.S. Department of Education
 - b. concerning alleged failures by the school system to comply with the requirements of FERPA. The name and address of the Office that administers FERPA are:

Family Policy Compliance Office

U.S. Department of Education 600 Independence Avenue, SW Washington, DC 20202-4605

Family Educational Rights and Privacy Act (FERPA) Notice of Directory Information

The *Family Educational Rights and Privacy Act (FERPA)*, a Federal law, requires that Oak Ridge Schools, with certain exceptions, obtain your written consent prior to the disclosure of personally identifiable information from your child's education records. However, the school may disclose appropriately designated "directory information" without written consent, unless you have advised the District to the contrary in accordance with District procedures. The primary purpose of directory information is to allow Oak Ridge Schools to include this type of information from your child's education records in certain school publications. Examples include:

- A playbill, showing your student's role in a drama production;
- The annual yearbook;
- Honor roll or other recognition lists; including the website and newspaper;
- Graduation programs; and
- Sports activity sheets, such as for wrestling, showing weight and height of team members.
- Directory information, which is information that is generally not considered harmful or an invasion of privacy if released, can also be disclosed to outside organizations without a parent's prior written consent. Outside organizations include, but are not limited to, companies that manufacture class rings or publish yearbooks. In addition, two federal laws require local educational agencies (LEAs) receiving assistance under the *Elementary and Secondary Education Act of 1965 (ESEA)* to provide military recruiters, upon request, with three directory information categories - names, addresses and telephone listings - unless parents have advised the LEA that they do not want their student's

information disclosed without their prior written consent. If parents want to opt out of the disclosure of Directory Information, release for student work and/or photographs on the Oak Ridge Schools websites, opt out forms are available in the school's main office or guidance department. Please notify the building level principal of your request for this form and return it to the school office.

- Oak Ridge Schools has designated the following information as directory information:
 - Student's name
 - Address
 - Telephone listing
 - Electronic mail address
 - Photograph
 - Date and place of birth
 - Major field of study
 - Dates of attendance
 - Grade level
 - Participation in officially recognized activities and sports
 - Weight and height of members of athletic teams
 - Degrees, honors, and awards received, including the most recent educational agency institution attended.

LEA Required Notifications

Per state law, each LEA is required to notify you of the following:

1. No fees or tuitions shall be required of any student as a condition of attending public schools or using its equipment while receiving educational training. All school fees must be authorized by the local board of education. Local board policy will determine activities during the school day and supplies that are required for participation in courses offered for credit or grade for which the board authorizes the requesting of fees.
2. The following school fees may be requested from but not required of any student, regardless of financial status (including eligibility for free or reduced-price lunch):
 - a. Fees for activities that occur during regular school hours (the required one hundred eighty (180) instructional days), including field trips, any portion of which fall within the school day; or for activities outside regular school hours if required for credit or grade;
 - b. Fees for activities and supplies required to participate in all courses offered for credit or grade, including interscholastic athletics and marching band if taken for credit in accordance with local board policies; and
 - c. Refundable security deposits collected by a school for use of school property for courses offered for credit or grade, including interscholastic athletics and marching band if taken for credit in accordance with local board policies.
3. LEAs shall establish a process by which to waive the following school fees for students eligible for free or reduced-price school lunches:
 - a. Fees or tuition applicable to courses taken for credit or grade during the summer by a student; except that non-resident students regularly enrolled in another school system may be required to pay fees or tuition for such summer courses; and
 - b. Fees required for graduation ceremonies.
4. LEAs are authorized to require payment of the following fees by all affected students:
 - a. Fines imposed on all students for late-returned library books; parking or other traffic fines imposed for abuse of parking privileges on school property; or reasonable charges for lost or destroyed textbooks, library books, workbooks or any other property of the school;

- b. Debts incurred pursuant to Rule 0520-01-02-.16(2)(b), Withholding of Student Grades for Debts Owed to the School;
- c. Refundable security deposits collected by a school for use of school property for participation in extracurricular activities;
- d. Costs for extracurricular activities occurring outside the regular school day including sports, optional trips, clubs or social events; and
- e. Non-resident tuition charged of all students attending a school system other than the one serving their place of residence.

McKinney –Vento Act for Homelessness (Title X)

The McKinney-Vento Act defines “homeless children and youths” as individuals who lack a fixed, regular and adequate nighttime residence. However, because the circumstances of homelessness vary with each family’s or unaccompanied youth’s situation, determining the extent to which the family or youth fits the definition will occur on a case-by-case basis. The Executive Director of Student Services is the homeless educational liaison for the Oak Ridge Schools.

Medicines

Prescription and non-prescription medication may be administered only with the written request and permission of a parent or guardian. The physician must complete the ORS-191 Authorization Form for prescription medications (and for any non-prescription medication to be given at a different dose than package insert recommendations.) For more information about administering medication at school, see [Board Policy 6.405](#).

Meningitis & Flu Awareness

Per state law, the District is required to provide information to parent(s)/guardian(s) as to the following diseases.

Meningococcal meningitis is inflammation of the tissues and fluid surrounding the brain and spinal cord. It can be caused by bacteria or viruses. Symptoms can include fever, sudden severe headache, stiff neck, rash, nausea, and vomiting.

The bacteria that causes meningococcal meningitis is very common. Most people will carry this bacteria in the back of their nose and throat at some point in their lives without ever getting sick. In a few people, the bacteria overcomes the body’s immune system and passes through the lining of the nose and throat into the blood stream where it can cause meningitis.

Meningitis is spread through exchange of respiratory droplets or saliva with an infected person. Only a small percentage of people who are exposed to the bacteria will develop meningitis. The bacteria that causes meningitis is not spread by casual contact or by simply breathing the air where a person with meningitis has been.

There is a vaccine that will decrease the risk of some types of meningococcal meningitis, but it does not totally eliminate risk of the disease.

Influenza is a contagious respiratory illness caused by influenza viruses that infect the nose, throat, and lungs. Symptoms can include fever, cough, sore throat, runny or stuffy nose, body aches, headache, chills, feeling tired, and sometimes vomiting and diarrhea.

Flu viruses are spread mainly by droplets made when someone with the flu coughs, sneezes, or talks. A person can also get the flu by touching something that has the flu virus on it and then touching his/her mouth, eyes, or nose.

There is a vaccine that can be received in the form of a flu shot or by nasal spray that can protect against the flu.

To receive additional information regarding these diseases, including locations to receive the vaccinations, contact:

Dr. Madison Branham, RN, DPNP

School Nurse Coordinator

mgbraham@ortn.edu | (865) 425-9009

Required Federal Notices Under No Child Left Behind (ESSA)

Parents may request, in accordance with public records policy, information about the professional qualifications of their child's classroom teacher by contacting the Human Resources office.

If a child is the victim of a violent crime at school, the child has the right to attend another grade- appropriate public school in the district if the applicable offense is identified and defined in T.C.A. 40-38-111(g).

Section 504

Section 504 of the Rehabilitation Act of 1973 provides that: No otherwise qualified individual with handicaps in the United States...solely by reason of his/her handicap, be excluded from the participation in, be denied the benefits of, or be subjected to discrimination under any program or activity receiving federal financial assistance.

The Section 504/ADA Coordinator for student concerns is: Executive Director of Student Services

304 New York Avenue

Oak Ridge, TN 37831 (865) 425-9025

The Section 504/ADA Coordinator for staff concerns is: Director of Human Resources

304 New York Avenue

Oak Ridge, TN 37831 (865) 425-9008

Statement of non-discrimination (Title IX)

The Oak Ridge Schools Board of Education prohibits discrimination against any student on the grounds of race, color, religion, national origin, sex, or disability. The Oak Ridge Schools seek to fully comply with the Civil Rights Act of 1964, Title IX of the Educational Amendments of 1972, Section 504 of the Rehabilitation Act of 1973, the Americans with Disabilities Act, and the Individuals with Disabilities Education Act. Further, the Board of Education forbids sexual allegation. No member of the Board, employee of the schools, agent of the schools, or student of the schools may harass any employee, person seeking employment or student on the basis of sex. Any person who believes they have been excluded from, or denied participation in, or refused the benefits of, or otherwise subjected to discrimination in school, should report all incidents to the principal immediately. Principals will report all student incidents to the Title IX Coordinator.

In accordance with Federal law and the U. S. Department of Agriculture policy, Oak Ridge Schools is prohibited from discriminating on basis of race, color, national origin, sex, age or disability. To file a complaint of

discrimination, write USDA, Director, Office of Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410 or call (800) 795-3272 or (202) 720-6382 (TTY).

Surveys, Analyses, and Evaluations of Students

Surveys, analyses, and evaluations for research purposes shall be allowed by the Board when the project is viewed as contributory to a greater understanding of the teaching-learning process, the project does not violate the goals of the Board, and the disruption of the regular school program is minimal.

No student shall be required to submit to a survey, analysis, or evaluation that reveals information concerning:

1. Mental or psychological problems of the student or the student's family;
2. Sexual behavior or attitudes;
3. Illegal, anti-social, self-incriminating, or demeaning behavior;
4. Critical appraisals of other individuals with whom respondents have close family relationships;
5. Legally privileged relationships;
6. Income; or
7. The collection of student biometric data involving the analysis of facial expressions, EEG brain wave patterns, skin conductance, galvanic skin response, heart-rate variability, pulse, blood volume, posture, and eye-tracking

without the prior consent of the student (if the student is an adult or emancipated minor), or in the case of an unemancipated minor, without the prior consent of the parent/guardian.

The collection of the following student data is strictly prohibited:

1. Political affiliation or voting history;
2. Religious practices; and
3. Firearm ownership.

Per state and federal law, prior to the dissemination of a survey, analysis, or evaluation to students, parent(s)/guardian(s) shall be notified of their ability to review the materials. Such notification shall include information indicating the purpose of the survey, analysis, or evaluation as well as who will have access to the results. The survey, analysis, or evaluation shall only be administered to students under the age of eighteen (18) whose parent(s)/guardian(s) provide written, informed, and voluntarily signed consent. A student who is eighteen (18) years of age or older may participate after he/she provides written, informed, and voluntarily signed consent.

The following surveys will be administered to ORS students this year:

- **Universal Wellness Screener:** A tool to help us measure success in the Life Ready portion of the Portrait of a Graduate: Self-awareness, self-discipline, and empathy. – Administered in the Fall
- **Educational Effectiveness Survey:** Diagnostic tool that captures students' perceptions and attitudes toward school to help drive improvement and increase student success. – Administered in the Winter
- **TN Together Survey:** A tool used to capture data on substance use behaviors and attitudes among Tennessee public 8th , 10th-, and 12th grade students. – Administered in the Spring

[Board Policy 6.4001](#)

Title I

Title I programs provide funds to school districts in order to assist schools with the highest levels of economically disadvantaged youngsters to improve student achievement for all participating children, improve staff development and improve parental and community involvement.

Title III – English Language Learners

Title III programs focus on two main purposes: 1) ensure that English Learners (ELs) attain language proficiency and meet state academic standards and 2) provide enhanced instructional opportunities for immigrant children and youth.

Title VI – Civil Rights Act of 1964

No person in the Oak Ridge Schools shall, on the grounds of race, color, or national origin, be excluded from participation in, be denied the benefits of, or be subjected to discrimination under any school program or school activity. The Executive Director of Student Services is the Title VI contact for any student concerns. The Director of Human Resources is the Title VI contact for any staff concerns.

Tennessee Department of Education Contact Information

Answers to many questions and much helpful information may be obtained from the State Department of Education by calling 1-888-212-3162 or visiting <http://www.state.tn.us/education/speced/index.htm>.

Legal Services Division

Division of Special Education, Tennessee Department of Education 710 James Robertson Parkway
Andrew Johnson Tower, 5th Floor Nashville, Tennessee 37243-2851

Phone: (615) 741-2851

Fax: (615) 253-5567 or (615) 532-9412

East Tennessee Regional Resource Center 2763 Island Home Boulevard Knoxville, Tennessee 37920

Phone: (865) 594-5691

Fax: (865) 594-8909

Child Advocacy Group Contact Information

In addition to the state and local resources available to parents and children, there are many agencies and organizations that offer support, information, training and help in advocating for persons with disabilities in Tennessee.

A few of these organizations are listed below:

The ARC of Tennessee is on the Internet at <http://www.thearchtn.org/> 44 Vantage Way, Suite 550

Nashville, TN 37228

Phone: (615) 248-5878 Toll free: 1-800-835-7077

E-mail: p.cooper@thearchtn.org

Support and Training for Exceptional Parents (STEP) is on the Internet at <http://www.tnstep.org/> East Tennessee

712 Professional Plaza (423) 639-2464

Greeneville, TN 37745 Karen.Harrison@tnstep.org

Tennessee Protection & Advocacy (TP&A) is on the Internet at <http://www.tpainc.org/> 416 21st Avenue, South Nashville, TN 37212

1-800-287-9636 (Toll free) or (615) 298-1080

(615) 298-2471 (TTY) Fax (615) 29802046

Tennessee Voices for Children is on the Internet at <http://www.tnvoices.org/main.htm> East Tennessee

Knoxville Area Phone (865) 609-2490 Fax: (865) 609-2543

These are but a few of the organizations available to help with information, training, and advocacy. For a more extensive list visit the Tennessee Disability Services – Disability Pathfinder Database:

<http://mingus.kc.vanderbilt.edu/tdir/dbsearch.asp>

On the web page, select your “county” and the “service” you desire from the drop-down lists and click “Submit.”

The information is provided as a service to individuals seeking additional avenues for help and information. The Department of Education does not intend this as an endorsement or recommendation for any individual, organization or service represented on this page.

COMPUTERS/PHONES/INTERNET

Computers, Computer Networks, and the Internet

(Revised Acceptable Use Policy included in next section)

Students in grades 5-12, please see the Access Oak Ridge Handbook located in the back of the Discipline Handbook.

Students are responsible for good behavior on school computers and personal computers brought to school for use at school, and computer networks just as they are in a classroom or a school hallway. Communications on the network are often public in nature. General school rules for behavior and communications apply.

The school computer network is provided for students to conduct research and to communicate with others. Independent access to the Internet is provided to students who agree to act in a considerate and responsible manner. Parent permission is required for minors. Access is a privilege, not a right. Access entails responsibility.

Individual users of the district computer networks are responsible for their behavior and communications over those networks. It is presumed that users will comply with district standards and will honor signed agreements.

Network storage areas may be considered analogous to school lockers. Network administrators, school site administrators, and teachers may review files and communications to maintain system integrity and to ensure that users are using the system responsibly. Users should not expect that files or communication stored on district servers are private.

During school, teachers of younger students will guide them toward appropriate materials. Outside school, families bear the responsibility for such guidance.

The following actions are not permitted (inclusive of, but not limited to):

1. Sending or displaying offensive messages or pictures
2. Using obscene language
3. Harassing, insulting or attacking others
4. Damaging computers, computer systems, or computer networks
5. Violating copyright laws, existing school policy or public law
6. Using the passwords of others

7. Trespassing in the folders, work, or files of others
8. Intentionally wasting limited resources
9. Employing the school resources for inappropriate purposes

Violations of acceptable use may result in loss of access. Additional disciplinary action may be determined at the building level in line with existing practice regarding inappropriate language or behavior. When applicable, law enforcement agencies may be involved.

Personal Communication Devices

Students in possession of a personal communication device such as a cell phone or similar devices without principal permission will be subject to their personal communication devices being confiscated. Confiscated devices may be returned to the student's parent/ guardian and/or local police. Disruptions to the classroom such as an audible signal, vibration, display of a message or other summon delivered to the possessor that is caused by a pager, telephone, or other device will be treated as disruptive behavior to the classroom environment and subject to the following consequences:

- First offense – item confiscated and returned to parent
- Second offense – item confiscated, returned to parent and student will serve detention
- Third offense – item confiscated, returned to parent and student will serve in- school suspension
- Fourth offense – item confiscated, returned to parent and student will serve out of school suspension.

Sexting

Sexting is the inappropriate display of the human anatomy via a cell phone or similar device. Sexting is illegal. This will result in suspension and will be reported to law enforcement officials.

STUDENT ASSIGNED DEVICE ACCEPTABLE USE POLICY

The following policies and manual detail proper use and care of student-assigned technology devices both off and on school property.

The Board of Education policies that are relevant to the use of student-assigned technology devices include:

4.406: Use of Internet

6.309: Zero Tolerance Offenses (Electronic) 6.311: Care of School Property

6.312: Use of Personal Communication Devices and Electronic Devices 6.709: Student Fees and Fines

Network and District Resources

The purpose of the Oak Ridge Schools district network is to support education, particularly in the areas of research and communications, by providing access to a multitude of electronic resources and the opportunity to collaborate with other individuals and groups. Such open access is a privilege and requires that individual users act responsibly. Users must respect the rights of others, respect the integrity of the computer network, and observe all relevant federal and state laws as well as Oak Ridge Schools district policies and guidelines. Misuse of computing, networking, and information resources may result in the loss of computing privileges and/or other appropriate disciplinary actions up to and including suspension or expulsion.

Privacy

All users are warned that no guarantee of privacy exists in the use of Oak Ridge Schools district technological resources. Users should not assume that files or communications accessed, downloaded, created or transmitted using district resources or stored on services or hard drives of individual computers will be private.

Respectful Conduct

Users of the Oak Ridge Schools technology resources are expected to respect district property and be responsible in using technology equipment. Users are to follow all instructions regarding maintenance or care of the equipment. Users may be held responsible for any loss or damage caused by intentional (malicious) or negligent acts while district technology is in their care. The school district is responsible for any routine maintenance or standard repairs to school system computers. With these guidelines in mind, students should:

- Use assigned devices as required by instructors
- Be considerate when using scarce resources (scanners, printers, paper and bandwidth)
- Avoid deliberately disrupting system performance or interfering with the work of another user
- Report equipment problems immediately to instructor or helpdesk technician

Responsibilities

- Users will accept the responsibility for all material sent from and/or stored in their account.
- Users will not download copyrighted software, inappropriate text and graphic files, or files dangerous to the integrity of the network.
- Users will not tamper with, modify, or change the district system software, hardware or wiring or take any action to violate the district's security system.
- Users will not use the district's electronic technologies in such a way as to disrupt the use of the system by other users.

Misuse

Examples of misuse include, but are not limited to:

- Using the district's electronic technologies to engage in any illegal act or violate any local, state or federal laws, including downloading copyrighted material
- Using electronic mail to harass others, including but not limited to the use of vulgar or offensive language and terms.
- Accessing, reviewing, uploading, downloading, completing, storing, printing, posting, receiving, transmitting, or distributing:
 - Pornographic, obscene or sexually explicit material or other visual depictions; obscene, abusive, profane, lewd, vulgar, rude, inflammatory, threatening, disrespectful or sexually explicit language;
 - Materials that use language or images that are inappropriate in the education setting or disruptive to the educational process;
 - Materials that use language or images that advocate violence or discrimination or threatens the safety of others
 - Masking the identity of an account or machine
 - Posting materials that violate existing laws or Oak Ridge School district policies
 - Sending chain letters over the network or "broadcasting" messages to lists or individuals which would cause congestion of the networks or otherwise interfere with the work of others

- Using a computer account, other than your own, without authorization
- Gaining unauthorized access to any computer system
- Knowingly performing an act which will interfere with the normal operation of computers, terminals, peripherals, or networks
- Demonstrating a suspected security violation
- Attempting an unauthorized login to any school system computer on the network as a system administrator
- Knowingly running, installing, or sharing a program intended to damage or to place excessive load on a computer system or network, including viruses, Trojan horses, and worms
- Using the district's electronic technologies to vandalize, damage, or disable the property of another person or organization
- Attempting to circumvent data protection schemes or take advantage of security loopholes

Cyberbullying

Students should not use the Oak Ridge School district network or Internet access to make, distribute or redistribute jokes, stories or other material which is based on slurs or stereotypes relating to race, gender, ethnicity, nationality, religion or sexual orientation. As a district, we teach our students to identify various safety risks when online, including cyberbullying.

Per release of the FCC (Federal Communications Commission) and CIPA (Children's Internet Protection Act), students and staff shall not use cell phones, instant messaging, email, chat rooms, social networking sites, or other types of digital technology to bully, threaten, discriminate, or intimidate others. If a student or staff member receives a text, email, blog comment, social network post, or message that makes them feel uncomfortable or is not respectful, they must report the incident to the school administrator or building designee. Do not respond to the comment.

Personal Safety

Per compliance with CIPA, the Oak Ridge School district utilizes filtering software and other technologies to prevent students from accessing visual depictions that are obscene, pornographic or harmful to minors. The use of anonymous proxies to get around the content filter is strictly prohibited and will be considered a violation of this policy. Social networking resources will be for educational purposes only and will be conducted with proper supervision. No personal addresses, personal phone numbers or last names of students will be permitted to be given out on the Internet.

Social Networking

Oak Ridge Schools users with access to social networking sites as part of their student assignments are required to keep personal information out of their postings. All activities are limited to usage in association with activities of Oak Ridge Schools. Speech that is inappropriate for class is not appropriate on social media tools. Users are expected to treat others and their ideas with respect.

Creation of Web-Accessible Materials

All student-created web pages and materials that become a part of the Oak Ridge Schools website must be created in the context of a course and under the supervision of an instructor. All web pages are subject to initial approval and on-going review and should reflect the mission and character of the District and schools.

The web page cannot be used for personal financial gain, to express personal or political opinions, or to editorialize. The Technology Department reserves the right to reject all or part of a proposed or posted web page. Students and staff will not post or release student family name, password, username, email

address, home address, or other information that could help someone located or contact a student in person. Group photographs without names are preferred for all students.

Students utilizing classroom discussion boards/posts or chats should refrain from language that bullies, threatens, intimidates, or discriminates against others. Speech that is inappropriate inside the classroom is also inappropriate in digital discussion formats.

Artificial Intelligence (AI)

Oak Ridge Schools advocate for the integration of technology to facilitate student exploration and foster creativity. The following guidelines will be used to support the student use of artificial intelligence.

AI is not a substitute for schoolwork that requires original thought. Students may not claim AI generated content as their own work. The use of AI to take tests, complete assignments, create multimedia projects, write papers, or complete schoolwork without permission of a teacher or administrator is strictly prohibited. The use of AI for these purposes constitutes cheating or plagiarism.

In certain situations, AI may be used as a learning tool or a study aid. Students who wish to use AI for legitimate educational purposes must have permission from a teacher or an administrator. Students may use AI as authorized in their Individualized Education Program (IEP). Students may not use AI, including AI image or voice generator technology, to violate school rules or school district policies.

In order to ensure academic integrity, tests, assignments, projects, papers, and other schoolwork may be checked by AI content detectors and/or plagiarism recognition software.

Copyright Laws

Educational multimedia projects which incorporate portions of copyrighted works under these guidelines may be used for educational purposes and for curriculum-based learning activities. Students:

- Must seek individual permissions for all copyrighted works incorporated in their personal multimedia projects before reproduction and distribution
- May incorporate portions of lawfully acquired copyrighted works when producing their own educational multimedia projects for a specific course, for one-time use (i.e. not accessible electronically via the web or broadcasted)
- May perform and display their own educational projects in the course for which they were created and may use them in portfolios as examples of their academic work or for job and college entry interviews
- Are advised to exercise caution in using digital material downloads from the Internet in producing their own projects due to copywrite laws

Cybersecurity

Cybersecurity is an ever-growing threat, especially for students in an online world. Oak Ridge Schools utilizes multiple tools to protect students.

- **Gaggle** is a software tool that alerts school administrators of suspicious, harmful, or telling activity on student devices. This allows the district to identify and address a host of concerns including offensive media, unwelcome communications, suicidal intentions and more before they become larger problems. Gaggle monitors student laptops 24/7 through applications like Canvas, Office 365, Google and anywhere student email is used.
- **Website filters** are used by Oak Ridge Schools to filter all website content that students are able to access. These filters are customized by school and grade level so that students are able to

learn without accessing inappropriate material. This security feature is in compliance with CIPA as well as the Children’s Online Privacy Protection Act (COPPA).

DEVICE USE POLICY

Restricted Users and Unrestricted Users

Please note the following terms:

- **Unrestricted User** refers to students who take their district-issued technology device home with them after school is dismissed each day. These students have chosen *not* to opt out of the Student-Assigned Technology Device program.
- **Restricted User** refers to students that only use a district-issued technology device while on school property during the school day, returning the devices to the student help desk before leaving the school. Students can become Restricted Users either by opting out of the Student-Assigned Technology Device program or through disciplinary means.
- **Content Restricted User** refers to students who are restricted by accessible content *ONLY*. These students will still be permitted to take an assigned device home with them after school each day.
- In-person elementary school students will be considered **Restricted Users**. All students completing school from home are considered **Unrestricted Users** regardless of grade level.

Expectations

Throughout the remainder of the manual, the term “technology device” includes the laptop, charger, stylus and protective covering provided by the school.

Receiving a Technology Device

Students will use technology devices in a manner consistent with all Board of Education policies, district procedures and school rules, including this Acceptable Use Policy.

Returning a Technology Device

- The student’s school technology device and accessories, as listed above, must be returned to the school at the end of each school year.
- Students who graduate early, withdraw, are suspended or expelled, or terminate enrollment for any other reason must return their school technology device on the date of termination.
- Students who transfer to a school within the district must turn in their devices before transferring. The devices will be checked for damage and then will be sent to the student’s new school by the Technology Department.
- If a student fails to return the technology device at the end of the school year or upon termination of enrollment, that student/parent/guardian will be subject to the replacement cost of the device (see damage penalty matrix below).
- If the student/parent/guardian has unpaid penalties, a student transcript can be withheld or the student’s new school will be notified of the penalties.
- If a student has not returned their school-issued laptop after transferring to a new district, the device must be returned before records can be sent to another district.

Technology Device Use

Students are responsible for using the technology device according to school and district policies and procedures listed in this manual.

- If a student's technology device is not working or is damaged, the student must report the problem immediately to the Student Helpdesk.
- Failure to bring the district-issued technology device or other class materials does not release a student from his/her responsibility for class work. If a student repeatedly fails to bring materials to class, including the technology device, progressive discipline procedures will be followed.
- Students should charge their technology device each night at home so that it is fully charged when they arrive at school each day.
- Students should not lend their technology device to another person. If a student lends their device to someone else, the student who lent the device is responsible for any damages that take place as a result. Students should never leave their technology unattended unless requested to do so by a staff member. When not in a student's possession, the device should be in a secure, locked environment.
- Each device has a unique serial number and asset tag. Students should not modify or remove this tag. If a label has been damaged or has fallen off, the student must return the device to the Student Helpdesk so that a new label can be made.
- Students should not write on, draw on, or add stickers or labels to the technology device. No other form of tampering will be permitted.
- It is the student's responsibility to back up projects and content.
- Students may add music subscription service to their device with parent's agreement. This information may be inspected and inappropriate, graphic, or offensive material may be removed.
- The technology device is the property of Oak Ridge Schools and may be collected and inspected at any time. Students have no right to privacy for any material on a technology device.

Technology Device Guidelines

Care and Maintenance

- Technology devices should NEVER be picked up by the lid. Students should close the technology device before it is picked up.
- Students will use the school-issued protective covering at all times. Damage to the device that occurs because the device case is not in use will be considered malicious damage and will incur additional penalties.
- When using ports for headphones, microphones, a computer mouse, etc., use care when plugging in and taking out devices.
- Technology devices should be kept at room temperature and should NOT be exposed to extremes of hot or cold. Students should not leave their technology device in a vehicle for extended periods of time, and students should not leave their technology device outside.
- Liquids and food should not be used/consumed in the vicinity of the device or accessories.
- The device should never be placed in an area where it could accidentally be sat or stepped on. In addition, devices can be a tripping hazard when charging.

Cleaning

- Cleaners, sprays, alcohol, ammonia or abrasives should not be used on the technology device.
- Technology devices should be cleaned with a soft, lint-free cloth.

Maximize Battery Life

Students should use the technology device in ways that maximize its battery life. See our [tech tip](http://www.ortn.edu/district/technology/help) at www.ortn.edu/district/technology/help for a step-by-step.

- **Battery Saver:** The Energy Saver control panel offers several settings that can adjust power levels for the device. Adjusting these settings will allow the device to dim the screen and use other components sparingly when it is not plugged in to charge. This helps preserve battery.
- **Brightness:** Students should dim the screen to the lowest comfortable level to achieve maximum battery life.
- **Bluetooth Wireless:** You may also turn off Bluetooth to maximize battery.
- **Applications and Peripherals:** Disconnect peripherals (external devices like headphones or keyboards) and completely quit and close applications that are not in use.

Bed Bug Protocol

If a bed bug is found, the device will be collected from the student and given to a school technician for treatment.

- Student will become a restricted user until District Administration has deemed the home cleared.
- The technology device may be treated with Prooff® Bed Bug and Dust Mite Killer. Parents are responsible for contacting the school if they wish to refuse treatment or limit treatment to non-chemical means (heat only).
- Once the treatment is complete the student's device will be returned to the student.
- The device will be re-treated every two weeks until District Administration has deemed the home cleared.

Parent/Guardian Guide for Safe Device Use

The following are suggestions to promote safe use of the technology device in your home.

- Monitor your child's home use of the Internet while using the technology device.
- Provide a place in an open area of your home, such as the kitchen or family room, where the device will be used.
- Use the internet with your child to help develop safe Internet habits. One suggested resource is NetSmartz – <http://www.netsmartz.org/internetsafety>
- Frequently ask to see your child's device and ask how it is being used.
- Review the programs installed on the device with your child and ask them what each program does.
- Do not hesitate to contact your school if you have any questions or concerns about the technology device.

Repair and Replacement Guidelines

The following is designed to be a guide and reference for dealing with issues related to student technology device damage with the understanding that the goal is for every student to have an operational device. Typically, issues will arise over one of the following: Theft, Non-preventable Damage, Preventable Damage/Negligence, and Intentional (Malicious) Damage/Recklessness.

Theft/Non-Preventable Damage

For theft:

If a student's device is stolen on school property, the student must report the loss immediately to school administration. If the device is stolen outside of school, parents/guardians must report the loss immediately to local police and obtain a police report. If it is not clear where a device was stolen, please contact police and obtain a police report.

- An administrator will meet with student and parent/guardian in order to investigate the theft.
- A police report is required in all instances to document a theft.

- After a police report is submitted, the student will become a Restricted User during the time of the investigation. Upon finalizing the report, a student may be issued a replacement computer and return to Unrestricted User status.

For non-preventable damage (these are rare, but examples may include an auto accident or a house fire):

- An administrator will meet with the student to investigate the incident and discuss with parent/guardian as necessary
- A loaner computer will be issued until the accident can be verified. Upon determination of a verifiable accident, the student will be issued another computer permanently.

Wear and Tear

If the device has minor damage due to wear and tear based on required use, no penalties will be assessed. "Wear and tear" is defined as minor cosmetic blemishes only. The device should remain fully functional and safe to use.

Unintentional Damage/Negligence

Damage must be reported as soon as possible, within a window of one week from the time of the damage unless the damage occurs during a break; in this case, the damage must be reported within one week of the student's return to school.

- Each student will be allowed 3 incidents of unintentional damage per school year without being assessed a damage penalty. A fourth incident will result in a \$50 charge. Additional \$50 charges will be assessed for each further incident of unintentional damage.
- An administrator will meet with the student to investigate the incident and discuss with parent/guardian as necessary.
- Student will become a Restricted User until any damage penalty or replacement costs are received. Principals may make an exception to this rule if the student's family has agreed upon and begun a payment plan for the remainder of the penalty.
- The replacement cost of the device cannot be satisfied by families purchasing their own replacement device or accessories from a third party.

Lost Device

If a student's device is lost, whether on or off school property, the student must report the loss immediately to school administration. Students have five days to report lost/stolen devices. Please see the damage matrix for all associated penalties.

Intentional (Malicious) Damage/Recklessness

- The parent/guardian and student have accepted responsibility for the machine and, therefore, are liable for the cost of the repair or replacement of the device.
- An administrator will meet with the student to investigate and discuss with parent/guardian as necessary.
- Student will become a Restricted User until the cost of the repair or replacement is received. Principals may make an exception to this rule if the student's family has agreed upon and begun a payment plan for the remainder of the penalty.
- The replacement cost of the device or accessories cannot be satisfied by families purchasing their own replacement items from a third party.
- The cost for repairs will be assessed for each reported incident.

- Please note that intentional (malicious) damage also includes the removal of asset tags and power supply identifiers.
- Multiple offenses should be handled appropriately and in consultation with the district office if necessary.
- If a student owes a penalty at the beginning of the school year based on the previous year, the penalty will have to be paid before a device is issued. Student will remain a Restricted User until the penalty has been paid. Principals may make an exception to this rule if the student's family has agreed upon and begun a payment plan for the remainder of the penalty.

Accessories Damage and Replacement

Damage to laptop accessories such as styluses, chargers or bags will be repaired when possible. If repair is not possible, or if accessories have been lost/stolen, the student will be responsible for purchasing a replacement directly from Oak Ridge Schools. Replacement accessories may not be purchased from a third party.

If a student owes penalties for lost/damaged accessories at the beginning of the school year based on the previous year, the replacement cost must be paid before a replacement accessory is issued. Principals may make an exception to this rule if the student's family has agreed upon and begun a payment plan for the remainder of the replacement cost.

Please see the matrix below for costs associated with replacement technology accessories.

- The parent/guardian and student have accepted responsibility for the machine and, therefore, are liable for the cost of the repair or replacement of the device.
- An administrator will meet with the student to investigate and discuss with parent/guardian as necessary.
- Student will become a Restricted User until the cost of the repair or replacement is received. If the payment is not received within 30 days, the student will be removed from Restricted User status and will only be able to use classroom machines. Principals may make an exception to this rule if the student's family has agreed upon and begun a payment plan for the remainder of the penalty.
- The replacement cost of the device or accessories cannot be satisfied by families purchasing their own replacement items from a third party.
- The cost for repairs will be assessed for each reported incident.
- Please note that intentional (malicious) damage also includes the removal of asset tags and power supply identifiers.
- Multiple offenses should be handled appropriately and in consultation with the district office if necessary.
- If a student owes a penalty at the beginning of the school year based on the previous year, the penalty will have to be paid before a device is issued. Principals may make an exception to this rule if the student's family has agreed upon and begun a payment plan for the remainder of the penalty.
- Discipline measures will start over at the beginning of each new school year.

Accessories Damage and Replacement

Damage to laptop accessories such as styluses or chargers will be repaired when possible. If repair is not possible, or if accessories have been lost/stolen, the student will be responsible for purchasing a replacement directly from the Technology Department. Replacement accessories may not be purchased from a third party.

Please see the Penalty Damage Matrix for costs associated with replacement technology accessories.

Penalty Damage Matrix

The following table summarizes the consequences of the various damage scenarios for the technology device, including the device itself, charger, stylus and bag.

Please note that Restricted Users, including those who opt-out of the program, will not be responsible for any damage payments apart from those associated with intentional (malicious) damage incidents. In turn, elementary school students who are Unrestricted Users (are allowed to take home devices from school) will be responsible for any damage penalties incurred while the device is at home.

The maximum out-of-pocket cost for damages will not exceed \$50 per act of accidental damage. Additional damages may be added on a case-by-case basis.

Damage	Financial Consequence	Additional Consequence
Laptop Charger Damage/Replacement Needed	\$17 replacement cost	No additional consequence
Device Bag Required Replacement	\$32 full replacement cost <ul style="list-style-type: none"> • Less than 1 year - \$32 • Between 1 - 2 years-\$24 • Between 2 - 3 years - \$16 • Between 3 - 4 years - \$8 	No additional consequence
Stylus Damage/Replacement Needed	\$30 replacement cost	No additional consequence
MiFi Damage/Replacement Needed	\$35 replacement cost	No additional consequence
Unintentional Damage for a Device 1st, 2nd, or 3rd offense in a year (includes more than one incident within the school year)	No penalty	No additional consequence
Unintentional Damage for 4 or more offenses	\$50 penalty	No additional consequence
Lost Device	Up to \$615 replacement cost	No additional consequence
Stolen Device	\$50 replacement cost	No additional consequence
Intentional (Malicious) Damage	Up to \$615 for replace/repair	The student will become a Restricted User for the remainder of the school year and face suspension as determined by administration

Opting Out

Parents have the right to opt out of the Student-Assigned Technology Device program. Opting out will mean that the student will not receive a personally assigned technology device for the entirety of the 2023-2024 school year.

The student will be considered a Restricted User and can pick up a device each morning from their school's Student Help Desk. This device must be returned to the help desk by the end of school each day. This device may NOT be taken home.

To opt out of the program, middle school and high school parents must pick up an opt out form from their student's school. Signed forms must be returned to the school as soon as possible.

Oak Ridge Board of Education

Monitoring: Review: Annually, in September	Descriptor Term: School Calendar	Descriptor Code: 1.800	Issued Date: 04/28/14 04/28/14
		Rescinds:	Issued: 04/28/14

1 No later than the end of the school year, the Board will adopt, upon the recommendation of the
2 Superintendent, an official school calendar for the succeeding school year.¹ The calendar will identify
3 holidays, vacation days, summer sessions and other extensions of the school year. The calendar may be
4 revised by the Board, upon recommendation of the Superintendent, due to inclement weather or other
5 factors. The regular school year shall be 200 days¹ and scheduled as follows:

- 6 • A minimum of 180 student attendance days;
- 7 • A minimum of five (5) days in-service education for all certificated personnel;
- 8 • One (1) days for parent-teacher conferences;
- 9 • Ten (10) days paid vacation for all certified personnel; and
- 10 • ~~Two (2)~~ Four (4) discretionary days; and
- 11 • Students will not attend school on major election days.

12 The calendar shall be distributed to the school staff at the opening of the school term.

13 STUDENT ATTENDANCE DAYS

14 When schools are closed due to emergencies or unforeseen circumstances such as epidemics or
15 inclement weather, the time lost shall be made up to the required minimum unless otherwise approved
16 by the State Department of Education.

17 IN-SERVICE EDUCATION

18 Each day of in-service education included in the school calendar shall be equivalent to not less than six
19 (6) hours of planned activities.²

20 DISCRETIONARY DAYS

21 ~~Two (2)~~ Four (4) discretionary days shall be included in the calendar and may be designated by the
22 Board as student attendance days, in-service days or administrative days, which may be used by
23 administrators, faculty and staff for preparation for commencement of classes, record keeping, grading
24 examinations, parent-teacher conferences and other classroom functions.¹

25

Legal References

1. TCA 49-6-3004 (a)(1)-(6)
2. State Board of Education Guidelines for Planning Approvable In-Service Education Activities

Cross References

- Compensation Guides and Contracts 5.110
In-Service & Staff Development Opportunities 5.113
Attendance 6.200

Oak Ridge Schools Board of Education

Monitoring: Review: Annually, in October	Descriptor Term: Emergency Preparedness Plan	Descriptor Code: 3.202	Issued Date: 08/07/23
		Rescinds:	Issued: 08/07/23 08/01/22 08/26/19 08/28/17 06/27/16 11/24/14 06/22/09

1 The Superintendent or designee shall be responsible for developing, maintaining, and acquiring board
 2 approval of the district Emergency Preparedness Plan,¹ which shall include procedures for bomb
 3 threats, civil disturbances, armed intruders, earthquakes, fires, tornadoes or other severe weather, and
 4 medical emergencies.

5 The principal of each school shall develop and implement emergency preparedness drills, which shall
 6 be approved by the Superintendent or designee. When appropriate, such drills shall be held in
 7 conjunction with emergency response agencies.

8 FIRE AND SAFETY DRILLS

9 The principal shall ensure that one fire drill requiring full evacuation is given every thirty (30) school
 10 days, with two (2) fire drills occurring during the first thirty (30) full days of the school year.
 11 Additionally, he/she shall ensure that four (4) fire safety educational announcements are conducted
 12 throughout the year.²

13 The principal shall ensure that three (3) additional safety drills are given during the school year.³ These
 14 drills may cover inclement weather, earthquakes, armed intruders, or other emergency drills that do not
 15 require full evacuation. A record of all fire or safety drills, including the time and date, shall be kept in
 16 each school's office.³

17 The principal shall regularly check the quantity, locations, and conditions of fire extinguishers and
 18 shall give all school personnel instructions on how to properly use fire extinguishers.

19 The district shall work with local law enforcement and the local fire department to develop a procedure
 20 for identifying the cause of fire alarm activation. This procedure must be in place by January 1, 2025
 21 and shall be reviewed and updated annually thereafter.⁴

22

23

1 ANNUAL DRILLS⁴⁵

2 The principal shall ensure that the school safety team conducts each of the following type of drills
3 annually:

- 4 1. An armed intruder drill in coordination with local law enforcement;
- 5
- 6 2. An incident command drill; and
- 7
- 8 3. An emergency safety bus drill.

9 AED DRILLS⁵⁶

10 All schools shall conduct a CPR and AED drill to ensure ~~awareness students are aware~~ of the steps that
11 ~~shall~~**must** be taken in the event of a medical emergency. The principal shall be responsible for ensuring
12 the drill occurs.

13 The Superintendent/designee shall develop the necessary administrative procedures on AED and CPR
14 training, planning, notification, and maintenance to comply with state law.

15 MEDICAL EMERGENCIES/PANDEMIC FLU⁶⁷

16 In the event of medical emergencies, such as a pandemic flu outbreak, school officials shall cooperate
17 and consult with the local and state health departments and other local emergency or healthcare
18 providers in protecting students and the community from further infection. The Superintendent or
19 designee shall develop procedures for health emergencies in accordance with state law and regulations.

20 REMOTE LEARNING DRILLS⁷⁸

21 At least once each school year, a remote learning drill shall be conducted. The drill shall accurately
22 reflect how students will transition to remote learning in the event of a disruption to school operations.
23 Students shall not be asked or required to transition to remote learning at any time during the drill.

Legal References

1. TRR/MS 0520-01-02-.30(2); TCA 49-6-804; TCA 49-6-805(8)
2. TCA 68-102-137(b)
3. TCA 68-102-137(f)
4. [Public Acts of 2024, Chapter No. 563](#)
- 4-5. ~~TCA 49-6-807; Public Acts of 2023, Chapter No. 367~~
- 5-6. ~~TCA 49-2-122; TCA 49-6-1208; Public Acts of 2024, Chapter No. 625~~
- 6-7. TCA 49-6-3004(a), (e); TCA 49-5-404
- 7-8. TCA 49-2-139

Cross References

Emergency Closings 1.8011
Safety 3.201
Community Use of School Facilities 3.206

Oak Ridge Board of Education

Monitoring: Review: Annually, in October	Descriptor Term: <h2 style="margin: 0;">Security</h2>	Descriptor Code: 3.205	Issued Date: 08/07/23
		Rescinds:	Issued: <u>08/07/23</u> 08/23/21 11/24/14

1 *General*¹

2 The Superintendent/designee shall establish procedures to protect school property which shall include,
3 but not be limited to:

- 4 1. Closing and securing teacher work areas when left unattended or at the end of the day;
- 5 2. Denying students permission to use the classrooms, laboratories, gymnasiums or other school
6 facilities or equipment without appropriate supervision;
- 7 3. Controlling the issuance of keys;
- 8 4. Developing programs that contribute to the proper care and use of school facilities and
9 equipment; and
- 10 5. Ensuring that equipment purchased with federal funds is managed as directed by federal law.²

11 All exterior doors leading into a school building shall be locked at all times and access to school
12 buildings is limited to the school's primary entrance during the school day as well as when students are
13 present outside of regular school hours.³

14 The principal shall immediately call law enforcement officials and the Superintendent/designee in
15 cases involving illegal entry, assault and battery resulting in serious personal injury or involving the
16 use of a weapon, building damage, theft or vandalism endangering life health, or safety, or valid threats
17 of mass violence.⁴ The Superintendent/designee is authorized to sign a criminal complaint and press
18 charges. The Superintendent shall report all signing of such complaints to the Board.

19 ~~The principal shall notify the Superintendent/designee as soon as practical but no longer than 24 hours~~
20 ~~after a case of vandalism, theft, building damage and/or illegal entry.~~

21 ~~The Superintendent, or his/her designee, is authorized to sign a criminal complaint and to press charges~~
22 ~~against perpetrators for vandalism of school property. The Superintendent shall report all signing of~~
23 ~~such complaints to the Board.~~

24

1 AFTER SCHOOL HOURS

2 If, outside of regular school hours, there is a need to unlock the doors during a school activity, a school
3 district employee shall be stationed by the door to ensure access is limited to authorized persons.³

5 LAW ENFORCEMENT SERVICES¹

6 The Board may enter into a memorandum of understanding (MOU) with the chief of a law
7 enforcement agency to provide school policing. ~~Any memorandum of understanding~~The MOU shall
8 address, at a minimum, the following issues:

- 9 1. Any School Resource Officer (SRO) assigned under the MOU shall ~~a memorandum must~~ be in
10 compliance with all laws, regulations and rules of the Peace Officer Standards and Training
11 Commission at the time of assignment and remain compliant throughout the tenure of his ~~her or~~
12 ~~her~~ assignment;
- 13 2. As a condition of assignment, any SRO must participate in forty (40) hours of basic training in
14 school policing within twelve (12) months of assignment. Every year thereafter, the SRO shall
15 participate in a minimum of sixteen (16) hours of training specific to school policing. All
16 training programs shall be approved by the Peace Officers Standards and Training
17 Commission.³⁵
- 18 3. Any SRO assigned under the MOU memorandum remains an employee of the law enforcement
19 agency, ~~and is~~ subject to that agency's direction, control, supervision and discipline.
- 20 4. No ~~SRO officer~~ shall be assigned to a school, or continue in such an assignment, without the
21 consent of the Superintendent.
- 22 5. In the event that more than one (1) SRO is assigned to a school system, the law enforcement
23 agency shall designate one (1) of the SROs as the senior SRO, ~~or such other, appropriate title.~~
24 The duties of the senior SRO, ~~however designated~~, shall include, but not be limited to, the
25 following:
 - 26 a. Representing and carrying ~~To represent and carry~~ out the policies of the law
27 enforcement agency assigning the SROs.
 - 28 b. Supervising ~~To supervise~~ the SROs in the performance of their duties;
 - 29 c. Consulting ~~To consult~~ with the Superintendent regarding the best use of the available
30 resources for school policing; and
 - 31 d. Resolving ~~To resolve~~ disputes between the SROs and students or staff faculty members.
- 32 6. The MOU memorandum may be effective for any length of time, including continuing until
33 terminated by the parties, and may contain any reasonable notice requirement for the
34 termination of the MOU memorandum. However, the MOU memorandum shall contain a

1 provision allowing the Superintendent to suspend the active participation of any the SROs in
2 the event that the Superintendent believes that such suspension is best for the health, safety
3 and/or wellbeing of the students and/or faculty members.

4

5

6 **CYBERSECURITY**⁴⁶

7 The Superintendent/designee shall develop an administrative procedure regarding the district's
8 cybersecurity plan to identify cybersecurity risks, implement mitigation planning, and protect
9 cyberinfrastructure against cyberattacks and other cybersecurity threats and incidents.

10

Legal References

1. TCA 49-6-805(3)
2. 2 CFR § 200.313
- 2-3. TCA 49-6-817
- 3-4. Public Acts of 20242023, Chapter No. 882 367
- 4-5. TCA 49-6-4217
- 5-6. TCA 49-6-805(9)

Cross References

- Visitors to the Schools 1.501
Inventories 2.702
Care of School Property 6.311

Oak Ridge Board of Education

Monitoring: Review: Annually, in February	Descriptor Term: Physical Assault Leave	Descriptor Code: 5.307	Issued Date: 06/19/23
		Rescinds:	Issued: 01/26/15 <u>06/19/23</u>

1 General

2 Employees shall be notified of their right to report a physical assault to the appropriate law
 3 enforcement agency.¹

4 An ~~employee teacher~~ who is absent from assigned duties as a result of personal injury caused by
 5 physical assault or other violent criminal acts committed in the course of the ~~teacher's~~employee's
 6 employment duties; shall receive his/her full salary and full benefits until the ~~teacher~~employee is
 7 released by his/her physician to return to work or his/her physician determines the ~~teacher~~employee is
 8 permanently unable to return to work. Hourly employees shall receive an amount representing the
 9 average number of hours the employee works for the district per pay period along with their full
 10 benefits, if available, until the employee is released by his/her physician to return to work or his/her
 11 physician determines the employee is permanently unable to return to work. An hourly employee is not
 12 eligible to receive the continued pay and benefits if he/she has been employed by the district for less
 13 than one (1) full pay period.²

14 If the ~~teacher~~employee receives workers' compensation or ~~comparable~~similar benefits, ~~then~~ the Board
 15 shall pay the difference between that amount and the ~~teacher's~~employee's full salary-¹ or average pay,
 16 as applicable.² The district shall pay the full salary or average salary, or the difference between the
 17 employee's full salary or average pay, as applicable, and the workers' compensation or similar
 18 benefits, if any, for up to one (1) year.

19 **PHYSICIAN STATEMENT**

20 A signed statement listing the cause of the absence shall be provided by the employee on forms fur-
 21 nished by the Superintendent ~~of schools/designee~~ and shall promptly be given to the immediate
 22 supervisor in support of all claims. A certificate from the physician on forms furnished by the
 23 Superintendent ~~of schools/designee~~ may also be required to verify the extent of the injury.²³
 24

Legal References

1. [Public Acts of 2024, Chapter No.915](#)
- ~~1-2.~~ [TCA 49-5-714\(a\); Public Acts of 2024~~43~~, Chapter No. ~~343839~~](#)
- ~~2-3.~~ [TRR/MS 0520-01-02-.04\(4\)\(b\)](#)

Cross References

- Worker's Compensation 3.602
- Sick Leave 5.302
- Long Term Leaves of Absence 5.304



Oak Ridge

SCHOOLS

Maintenance and Operations

OFFICE OF MAINTENANCE AND OPERATIONS

DATE: May 31, 2024

TO: Bruce Lay, Executive Director of School Leadership

FROM: Allen Thacker, Director of Maintenance and Operations

SUBJECT: RMS Boiler Replacement Project

Mr. Lay,

I am recommending that the Oak Ridge Schools Board of Education approve the contract with McMahan Mechanical Inc. of Knoxville TN for the replacement of the Robertsville Middle School Boiler system in the amount of \$397,200.00. Work is scheduled to be started over the summer break and will be completed prior to the winter heating season. The project includes replacement of two boilers that have reached or exceeded their scheduled lifecycle, associated pumps, and piping that provide heating for the facility.

Funding for this purchase is from city CIP funding. Bids were advertised in accordance with state guidelines and made available on the Oak Ridge Schools' website and Vendor Registry with two qualifying vendors responding to the bid. A third vendor was disqualified due to failure to meet required bid specifications.

Thank you,

Allen Thacker

Director of Maintenance and Operations

Maintenance Office

100 Woodbury, Oak Ridge, TN 37830

(865) 425-3171

www.ortn.edu



Oak Ridge Schools

OFFICE OF
Business & Support Services

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

Bid Minutes
05/29/2024
RMS Boiler Replacement (RFP 24-010)
Business Services Conference Room
Administration Building

Present for the bid opening were:

Allen Thacker
Tim Conway
Mary Ann Riley
Candy Jett

Oak Ridge Schools Maintenance Supervisor
Lee Company
Oak Ridge Schools Purchasing
Oak Ridge Schools District Accountant

Bid responses were received from the following companies:

	<u>Bid Amount</u>
Lee Company Farragut, TN	\$416,493.00
McMahan Mechanical, Inc. Knoxville, TN 37909	\$397,200.00 **
Premier Boiler & Combustion, LLC Ringgold, GA	\$356,725.10 *

*Disqualified due to nonconformance with all bid specifications

** Recommended Bid Winner

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: RMS Boiler Replacement
RFP 24-010

Bid Opening: 2:00 PM EDT, May 29, 2024

Company Name: McMahan Mechanical, Inc.

Address: 6549 Creekhead Drive
Knoxville, TN 37909

Phone Number: (865) 951-1919

Email: dale@mcmahanmechanical.com

Signature: 

Title: Project Manager

Date: May 29, 2024

Main Bid: *This price is to be for the complete specified equipment and installation as outlined within this RFP 24-010. ALL COSTS ARE TO BE INCLUDED IN THE FINAL PRICE.*

Bid Amount: RMS Boiler Replacement \$ 397,200.00 USD

Three hundred ninety seven thousand two hundred and no/100

Please attach detailed specification



JMP Equipment Company, LLC
 Heating, Cooling, and Plumbing Representatives
since 1958

www.jmpco.com

Quotation No. MQ-54486

JMP Equipment Company, LLC	Bid Date	4/14/2023
	Date:	5/28/2024
Phone: 800-365-9010	Job:	Robertsville Middle School - 2023 Updates
Email: Rons@jmpco.com		Oak Ridge, TN
	Engineer:	

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
	100 - Boiler B-1,2 and Accessories			
2	FBN2001 - Crest Condensing Boiler natural gas fired, 2,000,000 Btu/Hr input, 1,924,000 Btu/Hr output, Condensing, 96.2% AHRI Thermal Efficiency, 25:1 Turndown, ASME Stainless Steel HX, 316L SS Fire Tubes, ASME relief valve	4174		
2	100289581 - KIT,NEUTRALIZER,2MIL BTU,CN4-2000			
2	100267012 - KIT,FLUE ADAPTER,8",SS TO CPVC			
2	100277760 - K,PUMP,VARIABLE SPEED,80-100			
2	41FFY-CI062P34-FBI-A7 - Style A7I Class 125 FF Flanged Cast Iron Body Y-Strainer, with 1/16" Perforated 304SS Screen for Water Service, Import, 4"	130		
2	4CG1F-CI-B2334 - 4CG1F-CI-B2334 4" GLOBE SILENT CHECK VALVE	116		
2	F31154DC10-7BV VLCAP - F31154DC10-7BV VLCAP 1.5" 10# HIGH CAP W/OPD & EXT VENT LIM GAS REGULATOR			
2	BSB-1 - Boiler Shutdown Button, Emergency Stop, Red Button <u>Tag: Magnet Filter On Common Header</u>			
1	BMXT/6 - Industrial Magnetic Filter, 6" Inlet Flange, 12" Vessel (440 gpm) - BMXT300HF/ANSI			
	Subtotal For Above:			\$153,618.08
	200 - Pumps S1,2 - And Accessories			
1	HYF PUMP PKG - HyFab Model eMHP-2-46022K-460-4 Duplex Pumping Package, Selected For 225 GPM (225 per pump) @ 100' TDH, 460/3/60, Unit Fully Piped, Wired, Mounted On Frame, And Factory Tested. 4" Ø 304 SS Headers Variable Frequency Drives Full Color 3.5" Touchscreen Variable Speed Pump Logic Controller	1085		

1	DBF-5HP - Neptune By-Pass Chemical Feeder 5 gallons	38	
	Subtotal For Above:		\$53,074.60
	300 - Hot Water Air Management		
1	5360-04F-12-003 - Bell and Gossett R-4F Flanged Rolairtrol Air Separator w/strainer	156	
1	110124 - Bell and Gossett 790-50 ASME 0.75" Relief Valve	1	
1	110196LF - Bell and Gossett B7-12 Pressure Reducing Valve 0.75" NPT 12# Brass Lead Free	3	
1	116665 - 116665 60 GAL ASME 16*72 TANK	120	
1	112011 - 112011 ATF-16 AIRTROL TANK FITTING	2	
1	201041012 - 201041012 SIGHT GLASS 12" 10-3/4" ACTUAL LENGTH OF GLASS	2	
1	113041 - 113041 DT-2 DRAIN-O-TANK	1	
	Subtotal For Above:		\$5,310.05
TOTAL PRICE FOR ABOVE EQUIPMENT:			\$229,179.62

Thanks,
Ron Summers



JMP Equipment Company, LLC
 Heating, Cooling, and Plumbing Representatives
since 1958

www.jmpco.com

Quotation No. MQ-54488

JMP Equipment Company, LLC	Bld Date	4/14/2023
	Date:	5/28/2024
Phone: 800-365-9010	Job:	Robertsville Middle School - 2023
Email: Rons@jmpco.com		Updates
		Oak Ridge, TN
	Engineer:	

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
	Combustion Air			
2	CENTROTHERM NS - Lot of 8" Centrotherm Inno Flue, Combustion Air Assuming 40', and 4 90's and end cap. (Final Lay out to be coordinated)			\$7,773.04
	Subtotal For Above:			\$7,773.04
	Exhaust Air			
2	CENTROTHERM NS - Lot of 8" Centrotherm Inno Flue, Exhaust Air Assuming 50', and 4 90's and end cap. (Final Lay out to be coordinated)			\$9,403.85
	Subtotal For Above:			\$9,403.85
TOTAL PRICE FOR ABOVE EQUIPMENT:				\$17,176.89

Thanks,
 Ron Summers

HOLD HARMLESS AGREEMENT

This Hold Harmless Agreement is between McMahan Mechanical, 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: McMahan Mechanical, Inc.

By: Dale Huskey

Title: Project Manager

STATE OF Tennessee

County of Knox

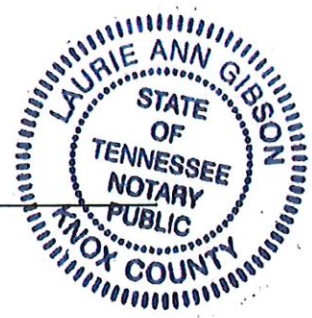
Dale Huskey personally appeared before me, the undersigned, with whom I am personally acquainted and who, upon oath, acknowledged that he/she/it executed the within instrument for the purposes therein contained, and who further acknowledge that he/she/it is authorized to execute this interment on behalf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

Dale Huskey
Signature

Witness by hand and Notaries seal at office this 29th day of May,
year of 2024.

Laurie Ann Gibson
Notary Public

My Commission Expires: August 29, 2026



NON-COLLUSION AFFIDAVIT

NON-COLLUSION AFFIDAVIT TO BE EXECUTED
BY CONTRACTOR

State of Tennessee

County of Knox

Jason McMahan, President, 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 29th day

of May, 2024.

Jason McMahan

Signature of Officer

Laurie Ann Gibson

Notary Signature

Jason McMahan

Typed Name of Officer

President

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

5/29/2024

Date

Dale Huskey

Printed Name

Project Manager

Title

McMahan Mechanical, 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

CRIMINAL BACKGROUND COMPLIANCE AFFIDAVIT

STATE OF Tennessee

COUNTY OF Knox

The undersigned, principal officer of McMahan Mechanical, 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 McMahan Mechanical, 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 : *Jason McMahan*

STATE OF Tennessee

COUNTY OF Knox

Before me personally appeared Jason McMahan with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the President of McMahan Mechanical, 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 29 day of May
2024

Notary Public : *Laurie Ann Gibson*

My commission expires: August 29, 2026



DRUG-FREE WORKPLACE AFFIDAVIT

STATE OF Tennessee COUNTY OF Knox

The undersigned, principal officer of McMahan Mechanical, 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 McMahan Mechanical, 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: Jason McMahan

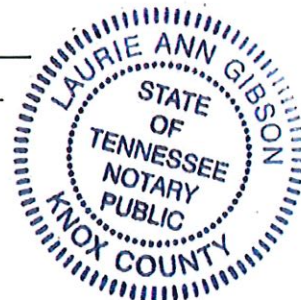
STATE OF Tennessee

COUNTY OF Knox

Before me personally appeared Jason McMahan
with whom I am personally acquainted
(or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she
is the President of
McMahan Mechanical, 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 29th day of May,
20 24.

Notary Public: Laurie Ann Gibson
My commission expires August 29, 2026



Request for Taxpayer Identification Number and Certification

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

Print or type
 See Specific instructions on page 2.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. McMahan Mechanical, Inc.	
2 Business name/disregarded entity name, if different from above	
3 Check appropriate box for federal tax classification; check only one of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <small>Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.</small> <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) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) 6549 Creekhead Drive	Requester's name and address (optional) Oak Ridge Schools 304 New York Ave. Oak Ridge, TN 37830
6 City, state, and ZIP code Knoxville, TN 37909	
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 Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

Social security number									
<table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> </tr> </table>					<table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> <td style="width: 25%;"></td> </tr> </table>				
or									
Employer identification number									
<table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 25%; text-align: center;">6</td> <td style="width: 25%; text-align: center;">2</td> <td style="width: 25%; text-align: center;">-</td> <td style="width: 25%; text-align: center;">1</td> </tr> </table>	6	2	-	1	<table border="1" style="width: 100%; height: 20px;"> <tr> <td style="width: 25%; text-align: center;">2</td> <td style="width: 25%; text-align: center;">5</td> <td style="width: 25%; text-align: center;">8</td> <td style="width: 25%; text-align: center;">1</td> </tr> </table>	2	5	8	1
6	2	-	1						
2	5	8	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 on page 3.

Sign Here Signature of U.S. person ▶ *Laune Nelson* Date ▶ *5/29/24*

General Instructions

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

Future developments. Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at www.irs.gov/fw9.

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? on page 2.

By signing the filled-out form, you:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
- Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

10 YEAR LIMITED WARRANTY

EFFECTIVE:

For **10 Years**, Lochinvar warrants the heat exchanger against failure due to defects in materials or workmanship. For the lifetime of the product, Lochinvar warrants the heat exchanger against failure due to thermal shock. For **5 years**, Lochinvar warrants the burner against failure due to defects in materials or workmanship. All parts are warranted for **18 months** from the date of manufacture or **1 year** from the date of start-up. This limited warranty is in effect when the product is installed within the United States or Canada, provided it remains at its original place of installation.

Warranty coverage begins on the date of installation OR 60 days from the date of manufacture if installation cannot be verified.
Note: The date of manufacture can be determined using the Serial Number located on the silver rating label.

WHAT IS COVERED:

In the event of a defect in materials or workmanship appearing during the limited warranty period, Lochinvar will repair, or at our discretion, replace any defective part or heat exchanger covered under this limited warranty. Any replacement part or heat exchanger will be warranted only for the unexpired portion of the original limited warranty period.

Unless authorized by Lochinvar, any heat exchanger must be returned to the factory for warranty determination, at the owner's expense.

If an identical model is no longer available due to a change in law, regulation, or standard, Lochinvar will replace the product with one having at least the same capacity and input. In these instances, you will have the option of paying the difference between what was paid for the original model and the new model with the additional features; or receiving a refund of the portion of the purchase price allocable, on a pro-rata basis, to the unexpired portion of the limited warranty period.

OWNER'S RESPONSIBILITIES:

Owners are responsible for:

- All labor, shipping, delivery, installation, and handling costs associated with the repair and/or replacement of the product.
- Selecting a qualified service provider. Visit www.Lochinvar.com for a list of service providers in your area.
- Following all instructions provided with the product.
- Retaining all bills of sale or receipts for proof of installation.
- Providing copies of all service and maintenance records.
- Contacting your installer or dealer as soon as any problem or defect is noticed.

WHAT IS NOT COVERED, PROBLEMS CAUSED BY:

- Improper gas supply line sizing, gas type, venting, connections, combustion air, voltage, wiring, or fusing
- Sediment, magnetite or lime scale buildup
- Improper installation, sizing, delivery, or maintenance
- Failure to follow printed instructions enclosed with the product
- Abuse, misuse, accident, fire, flood, Acts of God
- Improper venting and air intake materials, length, construction, or operations
- Claims related to rust, excessive noise, smell, or taste of water
- Failure to conduct authorized factory start-up as required
- Failure to properly perform maintenance, as outlined in the instruction manuals provided by the manufacturer
- Damages due to a failure to allow for thermal expansion
- Alterations that change the intended or certified use of the product
- Failure to follow applicable codes
- Improper chemical addition
- Service trips to explain proper installation, use, or maintenance of the product/unit or to describe compliance requirements under applicable codes and regulations
- Charges related to accessing the product including but not limited to door/wall removal, equipment rental, etc.
- Replacement parts after expiration of this warranty
- Premium associated with after hours or overtime labor

LIMITATIONS:

NOTWITHSTANDING ANYTHING ELSE TO THE CONTRARY, THIS IS YOUR SOLE AND EXCLUSIVE WARRANTY. ALL OTHER WARRANTIES, INCLUDING A WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE ARE EXPRESSLY DISCLAIMED. SELLER SHALL NOT BE LIABLE FOR ANY CONSEQUENTIAL, INCIDENTAL, SPECIAL, PUNITIVE OR OTHER INDIRECT DAMAGES. TOTAL LIABILITY ARISING AT ANY TIME SHALL NOT EXCEED THE PURCHASE PRICE PAID WHETHER BASED ON CONTRACT, TORT, STRICT LIABILITY OR ANY OTHER LEGAL THEORY.



HYFAB PACKAGED SYSTEMS WARRANTY

HYFAB warrants for a period of eighteen (18) months from date of shipment from its factory or one (1) year from date of installation, whichever occurs first, that all Products furnished by HYFAB are free from defects in materials and workmanship.

HYFAB's liability for any breach of this Warranty shall be limited solely to replacement or repair, at the sole option of HYFAB, of any part or parts found to be defective during the Warranty period provided the Product is properly installed and is being used as originally intended. Buyer must notify HYFAB of any breach of this Warranty within the aforementioned Warranty period: defective parts must be shipped by Buyer to Seller with transportation charges prepaid.

IT IS EXPRESSLY AGREED THAT THIS SHALL BE THE SOLE AND EXCLUSIVE REMEDY OF THE BUYER. UNDER NO CIRCUMSTANCES SHALL HY-FAB BE LIABLE FOR ANY COSTS, LOSS EXPENSE DAMAGES, SPECIAL DAMAGES, INCIDENTAL DAMAGES OR CONSEQUENTIAL DAMAGES ARISING DIRECTLY OR INDIRECTLY FROM THE DESIGN, MANUFACTURE, SALE, USE OR REPAIR OF THE PRODUCT WHETHER BASED UPON WARRANTY, CONTRACT, NEGLIGENCE OR STRICT LIABILITY. IN NO EVENT WILL LIABILITY EXCEED THE PURCHASE PRICE OF THE PRODUCT. THE WARRANTY AND LIMITS OF LIABILITY CONTAINED HEREIN ARE IN LIEU OF ALL OTHER WARRANTIES AND LIABILITIES, EXPRESSED OR IMPLIED. ALL IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE ARE HEREBY DISCLAIMED BY SELLER AND EXCLUDED FROM THIS WARRANTY.

HYFAB neither assumes nor authorizes any person to assume for it, any other Warranty obligation in connection with the sale of the Product. This Warranty shall not apply to any Product or parts of Products which (a) have been repaired or altered outside of HYFAB's facilities; or (b) have been subject to misuse, negligence or accident; or (c) have been used in a manner contrary to HYFAB's instructions.

In the case of products not manufactured by HYFAB, there is no warranty from HYFAB, but HYFAB will extend to the Buyer any Warranty of Seller's supplier of such products.

HYFAB

206 Seneca Road
Greensboro, NC 27406
Phone: 888-902-8324 Fax:
800-377-8792

www.hyfabco.com





Oak Ridge Schools
Mary Ann Riley, Purchasing
Specialist
304 New York Avenue
Oak Ridge, TN 37830

RFP 24-010 Robertsville Middle School Boiler
Replacement

Wednesday, May 29, 2024 @ 2:00pm ET

Submitted by:





Oak Ridge Schools
RFP 24-010 Robertsville Middle School Boiler Replacement
May 29, 2024 @ 2:00pm ET

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Bid Form

Boiler Specifications

Hold Harmless Agreement

Non-Collusion Affidavit

Iran Divestment Act Affidavit

Criminal Background Compliance Affidavit

Drug Free Workplace Affidavit

Lee Company TN Contractor License

Lee Company Evidence of Insurance COI

Lee Company Information & Overview

Lee Company Line Cards

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: **RMS Boiler Replacement**
RFP 24-010


Bid Opening: **2:00 PM EDT, May 29, 2024**

Company Name: LEE COMPANY

Address: 12522 Kingston Pike
Farragut, TN 37934

Phone Number: 865-424-5511

Email: tim.conway@leecompany.com

Signature: 
Scott Green

Title: Operations Manager

Date: 05/29/24

Main Bid: *This price is to be for the complete specified equipment and installation as outlined within this RFP 24-010. ALL COSTS ARE TO BE INCLUDED IN THE FINAL PRICE.*

Bid Amount: RMS Boiler Replacement \$ 416,493.00 USD

Please attach detailed specification

HOLD HARMLESS AGREEMENT

This Hold Harmless Agreement is between LEE COMPANY
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: LEE COMPANY
By: Scott Green
Scott Green
Title: Operations Manager

STATE OF Tennessee
County of Knox

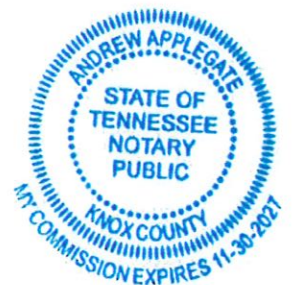
Scott Green personally appeared before me, the undersigned, with whom I am personally acquainted and who, upon oath, acknowledged that he/she/it executed the within instrument for the purposes therein contained, and who further acknowledge that he/she/it is authorized to execute this interment on behalf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

LEE COMPANY
Scott Green
Signature

Witness by hand and Notaries seal at office this 29th day of May,
year of 2024.

Andrew Applegate
Notary Public

My Commission Expires: 11-30-27



NON-COLLUSION AFFIDAVIT

NON-COLLUSION AFFIDAVIT TO BE EXECUTED
BY CONTRACTOR

State of Tennessee

County of Knox

Scott Green, 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 29th day

of May, 2024.

Scott Green

Signature of Officer

Andrew Applegate

Notary Signature

Scott Green

Typed Name of Officer

Operations 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

May 29, 2024

Date

Scott Green

Printed Name

Operations Manager

Title

LEE COMPANY

Name of Firm/Company

*https://tn.gov/assets/entities/generalservices/cpo/attachments/List_of_persons_pursuant_to_Tenn._Code_Annotation_12-12-106._Iran_Divestment_Act-July.pdf

CRIMINAL BACKGROUND COMPLIANCE AFFIDAVIT

STATE OF Tennessee

COUNTY OF Knox

The undersigned, principal officer of LEE COMPANY, 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 LEE COMPANY (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

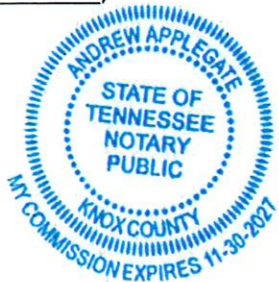
COUNTY OF Knox

Before me personally appeared Scott Green with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the Operations Mgr. of Lee Company 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 29th day of May, 2024.

Notary Public [Signature]

My commission expires: 11-30-27



DRUG-FREE WORKPLACE AFFIDAVIT

STATE OF Tennessee COUNTY OF Knox

The undersigned, principal officer of LEE COMPANY, 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 LEE COMPANY (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: Scott Green
Scott Green, Operations Manager

STATE OF Tennessee

COUNTY OF Knox

Before me personally appeared Scott Green with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the Operations Manager of Lee Company 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 29th day of May, 2024.

Notary Public: Andrew Applegate
My commission expires 11-30-27





STATE OF TENNESSEE
DEPARTMENT OF
COMMERCE AND INSURANCE



LEE COMPANY

405549

ID NUMBER: 9255
LIC STATUS: ACTIVE
EXPIRATION DATE: October 31, 2025

BOARD FOR LICENSING CONTRACTORS
CONTRACTOR

THIS IS TO CERTIFY THAT ALL REQUIREMENTS
OF THE STATE OF TENNESSEE HAVE BEEN MET

LEE COMPANY
4057 RUAL PLAINS CIR
FRANKLIN, TN 37064

State of Tennessee

405549

BOARD FOR LICENSING CONTRACTORS
CONTRACTOR
LEE COMPANY

This is to certify that all requirements of the State of Tennessee have been met.

ID NUMBER: 9255
LIC STATUS: ACTIVE
EXPIRATION DATE: October 31, 2025
UNLIMITED; BC; CE; CMC; MU; S-Medical Gas



IN-1313
DEPARTMENT OF
COMMERCE AND INSURANCE

Lee Company
Installation / Builders Risk
INSURER: Travelers Property Casualty Company of America
POLICY NUMBER: QT-630-5T394871-TIL-24
TERM: 3/1/2024 – 3/1/2025

Contractors Equipment – As per schedule on file with carrier

Coverage	Limit of Insurance	Deductible
Leased/Rented Equipment - Per Item	\$250,000	\$5,000
Installation / Builders Risk	\$750,000	\$10,000
Cargo – Per Conveyance	\$100,000	\$5,000



Form of Business

S-Corporation

Date of Incorporation – April 5, 1965

Number of Years in Business

80 years (Since 1944)

58 years under current name (formerly Lee Refrigeration)

Number of Employees

1,600+ Employees: 400 Office Employees, 1,200+ Field Employees

Company Officers

Richard Perko, P.E. CEO and President

Rob Ivy Chief Financial Officer

Dan Kalman Executive Vice President of Service

Stuart Price Executive Vice President of Operations

Robert Lunny Senior Vice President of FM²

Justin Braden Vice President of Construction

Brad Gipson Vice President of Construction

Office Locations

Corporate Office - Franklin, TN

Chattanooga, TN

Murfreesboro, TN

Knoxville, TN

Cookeville, TN

Madison, AL

Clarksville, TN

Bowling Green, KY

Financial Information

Last 5 Years of Revenue

<u>Year</u>	<u>Revenue</u>
2023	\$ 370 Million
2022	\$ 340 Million
2021	\$ 304 Million
2020	\$ 267 Million
2019	\$ 306 Million



Bonding Company Liberty Mutual
HUB International (formerly The Crichton Group)
3011 Armory Drive, Suite 250
Nashville, TN 37204 | (615) 383-9761

Bonding Limit \$125,000,000 aggregate
\$60,000,000 single project

Banking Pinnacle Financial Partners
Mr. Todd Carter
211 Commerce Street, Suite 300
Nashville, TN 37201
(615) 690-4064
Todd.carter@pnfp.com

Insurance Travelers Insurance
One Tower Square
Hartford, CT 06183

Bodily Injury/Property Damage:	\$ 1,000,000 each occurrence
Completed Operations:	\$ 2,000,000
General Aggregate:	\$ 2,000,000 per project
Umbrella:	\$15,000,000
Professional Liability:	\$ 1,000,000



Lee Company History and Overview

In 1944, L. Leon Lee formed Lee Refrigeration Service Company as a one-man operation servicing refrigeration & heating equipment. As Mr. Lee's business grew, his vision was one that always focused on people – with that foundation, his vision has grown and inspired Lee Company for three generations.

Today, this family-owned company employs over 1,600 people and serves clients nationwide with six offices in Tennessee, Kentucky, and Alabama (Franklin, Chattanooga, Cookeville, Knoxville, Bowling Green, and Huntsville).

Lee Company is a professional provider of comprehensive solutions and services for businesses and homes. With core competencies in HVAC, plumbing and electrical, we are committed to finding innovative and original solutions, thoughtfully and reliably, to meet the specific needs of every customer. Whether your solution needs are construction, engineering, service, building systems analysis, or facility management, Lee Company's value is its fully integrated approach to the delivery of these services. The depth and breadth of services we provide is unique in our industry. Our solutions provide a single source of responsibility and performance: an efficient and cost-effective method of meeting your goals.

The service offerings have dramatically increased since the 1940's, but Lee Company's focus is still on people – providing building owners and contractors a remarkable experience they can't get anywhere else.

Lee Company can deliver a project in a variety of methods from design/build to design/assist to plan/spec bids. Capabilities include HVAC, sheet metal, plumbing, electrical, medical gas, specialty piping and duct. Lee Company employs a full "Tech Services Group" which includes in-house Test & Balance, controls, and 3D BIM Coordination professionals.

Lee Company is dedicated to staying within professional licensing requirements and holds over 600 licenses in 26 different states. Licenses and certifications range from Professional Engineer, General Contractor, and HVAC Contractor to Master Plumber and Master Electrician.



Manufacturing

Our shop provides custom manufactured products and assemblies that help reduce downtime for systems and processes for clients such as:

- Electrical contractors
- General contractors
- Government agencies
- Healthcare facilities
- Industrial facilities
- Laboratories
- Specialty contractors
- Utilities
- Wastewater contractors

Our products include:

- Access ladders
- Air filtrations systems
- Booths for welding, grinding, and other work
- Complete pre-fabricated mechanical and plumbing piping systems
- Custom enclosures for ATM's/electrical/ fire protection/plumbing/ conditioned spaces/indoor and outdoor applications/etc.
- Custom equipment modifications
- Emergency pipe replacement spools
- Guard shacks
- Honed/Drilled materials
- Humidification
- HVAC control systems
- Industrial pipe spools
- Pipe fabrication
- Rooftop unit curb adaptors
- Security bar, frame and grate systems
- Service and operating platforms for all types of equipment
- Sheet metal fabrication
- Skid-mounted equipment (MPE, industrial process, etc.)
- Specialty climate-controlled enclosures
- Specialty firearms lockers and safes
- Steel fabrication

Construction / Special Projects

Design and construction of mechanical and plumbing systems, our core business for decades, has helped us become the "Premier Mechanical Services" provider in our markets.

Our services include:

- BIM/3D modeling
- Building automation controls
- Design/Build services with in-house professional engineers and designers
- Duct and pipe insulation
- Equipment installation
- Equipment startup and commissioning
- Field supervision
- Geothermal systems
- LEED AP's
- Medical gases
- Pipe fitting
- Plumbing
- Pre-construction service/estimating
- Pre-fabrication/logistics
- Project management
- Project scheduling
- Sheet metal
- Shop/Coordination drawings
- Site work
- Test and balance
- Variable refrigerant flow systems (VRF/VRV)
- Water treatment
- Welding



Facility Services

HVAC Maintenance Programs

- Coil cleaning
- Filter and belt replacement
- Technical inspection of equipment

Plumbing Maintenance Programs

- Certification of backflow devices
- Inspections of plumbing fixtures and equipment
- Maintenance on water heaters/boilers

HVAC Services

- Air compressors
- Air handling units
- Boilers
- Chillers
- Cooling towers
- Cooling/Heating problems
- Driers
- Equipment replacement
- Exhaust fans
- Heat wheels
- Humidification/Dehumidification problems
- Make-up air units
- Noise Issues
- Pumps
- Refrigeration and refrigerant recovery
- Test labs
- VAV systems

Plumbing Services

- Backflow devices
- Camera drain inspections
- Drain jetting
- Drain maintenance
- Faucets
- Hose bibbs/Wall faucets
- Pumps
- Sewer issues
- Urinals
- Water closets
- Water heaters
- Water leaks/drain/sewer problems

Electrical Services

- Arc-flash ratings/NFPA 70E
- Data logging/Test and balance
- EV-electrical vehicle charging
- Explosion proof
- Generator installation and maintenance
- Industrial
- Infrared testing
- Lighting retrofits
- Load testing
- Motor controls
- Outdoor lighting/Pole lighting
- Service upgrades
- Solar
- Surge protection
- Transformer/Utility
- Troubleshooting

Technical Services

- Air/Water test and balance
- Annual code compliance services
- Building automation systems
- Building commissioning, recommissioning and retrocommissioning
- Building forensics
- Compressed air audits
- Energy retrofits, including VFD's
- Energy star rating
- Fire damper inspections
- Hot water energy management systems
- HVAC and lighting control
- Indoor air quality (IAQ)
- Life safety/Fire code compliance
- Med gas inspections
- Steam trap retrofits



FM²: Facility Management & Maintenance

As part of Lee Company's Facilities Solutions, FM² gives you access to an experienced and skilled team, dedicated to your success. FM² professionals take care of facility operations, repair and maintenance needs so you can take care of business. We encourage you to review our list of services.

HVAC

- Equipment installation and replacement
- Equipment repair and service
- Inspections and diagnostics
- Planned maintenance (filters, belts, cleaning)

Plumbing

- Inspections and diagnostics
- Fixture repair and replacement
- Water heaters

Electrical

- Circuit modifications
- Exit signs
- Exterior lighting
- Inspections and maintenance
- Lamp and ballast repair and replacement
- Lighting maintenance
- Receptacles, breakers and panels

General Maintenance

- 24/7 emergency service
- Carpentry
- Carpet/Tile
- Ceiling
- Concrete
- Doors and windows
- Drywall
- Painting
- Roofing
- Site utilities/Grading

Managed Projects

- Site and parking lots
- Roofs
- Flooring
- Painting
- Minor interior refresh and reconfigurations
- Building exterior, windows, siding
- Industrial floor coatings

Services

- Exterior high pressure wash
- Fencing
- Floor care (carpet, tile, wood)
- Janitorial
- Landscaping
- Lawn care
- Parking lot
- Pest control
- Window cleaning

FM² provides a "block hour" approach for exceptional service at significant savings. With this system, you can hire one of our technicians for 4 or 8 hours of dedicated work at a specific site. We work around your needs. And we handle all your needs!



FM² Block Hours: A Handy Approach to Projects and Maintenance

Our well-trained technicians take care of everything from drywall to door knobs. They arrive on time, in a Lee Company uniform. They bring their own tools, including visual technology that allows them to “show” you issues even when you’re off site.

Our pros understand that budget management is part of facility management. FM² provides a “block hour” approach for exceptional service at significant savings. With this system, you can hire one of our technicians for 4 or 8 hours of dedicated work at a specific site. We work around your needs. And we handle all your needs!

- Change light bulbs
- Change ballast
- Light electrical: change switches and sensors
- Check/repair/replace exit lighting
- Hang signs, pictures, whiteboards
- Doors: repair/replace/install
- Door knobs/handles/kick plates/closers
- Partition repair
- Light carpentry
- Furniture repair: desks/chairs/tables/shelves
- Check fire extinguishers
- Change ceiling tiles
- Repair ceiling grid
- Painting
- Flooring: tile/carpet repair
- Light plumbing: flush valve replace/tank rebuild
- Drywall repair

If you have any questions, or would like details on FM² general maintenance block hours, please contact your Lee Company consultant or visit leecompany.com. We’re here to help, 24/7.

Bigger job? We can help.

Sometimes you need a licensed electrician or plumber for a specific job. Rest easy. Working with Lee Company also gives you fast access to the best licensed tradesmen in town!

CREST[®]

CONDENSING BOILER

Codes & Registrations

ANSI Z21.13/CSA Certified

ASME Certified, "H" Stamp / National Board

California Code Compliant

Canadian Registration Number (CRN)

CSD1 / Factory Mutual / GE Gap Compliant

South Coast Air Quality Management District
Qualified & Energy Star Rated (FB 0751-2001)

Smart Touch™ Features

CON-X-US Remote Connect

SMART TOUCH Touchscreen Operating Control

Full-Color 8" Touchscreen LCD Display

Built-in Cascading Sequencer for up to 8 Boilers

- › Built-in Redundancy
- › Cascade Multiple Sized Boilers
- › Lead/Lag Cascade
- › Efficiency Optimized Cascade

Front-End Loading Capability with Copper-Fin II[®]
and Power-Fin[®] Boilers

Building Management System Integration
with 0-10 VDC Input

BACnet MSTP Communications

Outdoor Reset Control with Outdoor Air Sensor

Password Security

Domestic Hot Water Prioritization

- › DHW tank piped with priority in the boiler loop
- › DHW tank piped as a zone in the system with the pumps controlled by the Smart System
- › DHW Modulation Limiting
- › Separately Adjustable SH/DHW Switching Times

Low Water Flow Safety Control & Indication

Inlet & Outlet Temperature Readout

Freeze Protection

Service Reminder

Time Clock

Data Logging

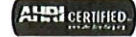
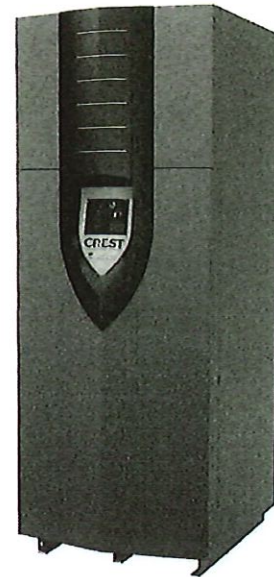
- › Hours Running, Space Heating
- › Hours Running, Domestic Hot Water
- › Hours Running, Modulation Rate
- › Ignition Attempts
- › Last 10 Lockouts

Programmable System Efficiency Optimizers

- › Night Setback
- › Anti-Cycling
- › Outdoor Air Reset Curve
- › Ramp Delay
- › Boost Temperature & Time
- › Modulation Factor Control

Three Pump Control

- › System Pump
- › Boiler Pump
- › Domestic Hot Water Pump



High-Voltage Terminal Strip

- › 120V/1PH/60Hz Power Supply (FB 0751-2001)
- › 208V/3PH/60Hz Power Supply (FB 2501-3501)
- › 480V/3PH/60Hz Power Supply (FB 4001-6001)
- › System Pump, Boiler Pump and DHW Pump Power

Low-Voltage Terminal Strip

- › 24 VAC Auxiliary Device Relay
- › Auxiliary Proving Switch Contacts
- › Alarm on Any Failure Contacts
- › Runtime Contacts
- › DHW Thermostat Contacts
- › Unit Enable/Disable Contacts
- › System Sensor Contacts
- › DHW Tank Sensor Contacts
- › Outdoor Air Sensor Contacts
- › Cascade Contacts
- › 0-10 VDC BMS External Control Contact
- › 0-10 VDC Variable Speed Boiler Pump Control Contact

Standard Features

Proof of Closure Valve (FB 6001)

Modulating Burner with up to 25:1 Turndown

Direct-Spark Ignition

Low NOx Operation

Sealed Combustion

Air Inlet Filter

Low Gas Pressure Operation

Vertical and Horizontal Direct Venting

- › Direct Vent up to 100 Feet
- › PVC, CPVC, Polypropylene or AL29-4C (FB 0751-4001)
- › AL29-4C (FB 0751-6001)

ASME "H" Stamped Heat Exchanger

316L Stainless Steel Fire Tubes

160 psi Working Pressure

On/Off Switch

Adjustable High Limit with Manual Reset

Low Water Cutoff with Manual Reset & Test

High & Low Gas Pressure Switches w/Manual Reset

Low Air Pressure Switches

Condensate Trap w/Blocked Drain Switch

Drain Valve

System Sensor

Outdoor Air Sensor

Inlet & Outlet Temperature Sensors

High-Voltage Terminal Strip

Low-Voltage Terminal Strip

Downstream Gas Test Cocks

50 psi ASME Relief Valve

Temperature & Pressure Gauge

Zero Clearances to Combustible Materials

High Altitude Models Available

SCCR of 5,000 A

10-Year Limited Warranty (See Warranty for Details)

1-Year Warranty on Parts (See Warranty for Details)

Optional Equipment

- Alarm on Any Failure
- ASME Relief Valve Option:
 - 75 psi 100 psi 125 psi 150 psi
- BMS Gateway - BACnet IP or LonWorks
- Condensate Neutralization Kit
- Common Vent Kits Damper
- Modbus Communication

Short Circuit Current Rating (SCCR) Options:

FB 2501 - 6001

- 100,000 A
- 200,000 A

- Motorized Isolation Valve
- RealTime O₂ Feedback™
- Variable Speed Boiler Pump
- Wireless Outdoor Temperature Sensor

Electrical Transformer Options (Shipped Loose):

- › FB 0751-2001
 - 208V/3PH/60Hz → 120V/1PH/60Hz
 - 480V/3PH/60Hz → 120V/1PH/60Hz
 - 600V/3PH/60Hz → 120V/1PH/60Hz
- › FB 2501-3501
 - 480V/3PH/60Hz → 208V/3PH/60Hz
 - 600V/3PH/60Hz → 208V/3PH/60Hz
- › FB 4001-6001
 - 208V/3PH/60Hz → 480V/3PH/60Hz
 - 600V/3PH/60Hz → 480V/3PH/60Hz



Lochinvar, LLC
300 Maddox Simpson Parkway
Lebanon, Tennessee 37090
P: 615.889.8900 / F: 615.547.1000
f i n @ Lochinvar.com

**CREST
COMMERCIAL
CONDENSING BOILER**

Submittal Sheet



Lochinvar®
HIGH EFFICIENCY BOILERS & WATER HEATERS

MODELS
FB 0751 - FB 6001
Series 1**

FBN-Sub-15

Job Name: Robertsville Middle School

Location: Oak Ridge TN

Contractor:

Type Gas: Natural

Engineer: Bedinger Consulting

Model #: FBN2001

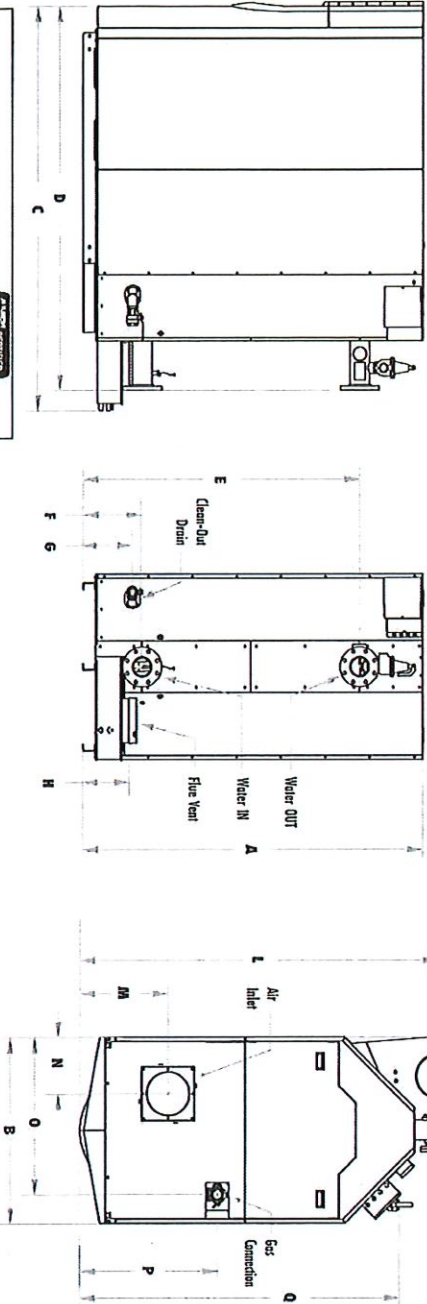
Agent/Wholesaler: JMP Equipment Co

Equipment Tag(s): B-1.2

SIDE

BACK

TOP



- Notes:**
- * Insert "N" for natural gas and "L" for LP gas models.
 - Indoor installation only.
 - Low NOx Operation.
 - Lochinvar should be consulted before selecting a boiler for installations having unusual piping and pickup requirements, such as intermittent system operation, extensive piping systems, etc.
 - The ratings have been determined under the provisions governing forced draft burners.
 - The Net AHRJ water ratings shown are based on a piping and pickup allowance of 1.45.

Model Number	Input MBH		Turndown	Gross Output MBH	Net AHRJ Rating MBH	Combustion Efficiency	Thermal Efficiency	A	B	C	D	E	F	G	H	I	M	N	O	P	Q	R	Gas Conn.	Water Inlet/Outlet	Air Inlet/Outlet	Vent Size	Oper. Weight (with water)	Ship. Weight (lbs.)
	Min	Max																										
FB-0751	50	750	15:1	722	628	96.4%	96.2%	78"	30"	55-1/2"	57-5/8"	66-1/8"	11-7/8"	11-3/8"	11-1/4"	51"	13"	8-3/4"	26-3/4"	23-3/4"	49-1/2"	7-3/8"	1-1/4"	3"	6"	6"	1,268	1,560
FB-1001	50	999	20:1	961	836	96.4%	96.2%	78"	30"	56-1/2"	57-5/8"	66-1/8"	11-7/8"	11-3/8"	11-1/4"	51"	13"	8-3/4"	26-3/4"	23-3/8"	49-1/2"	6-1/2"	1-1/4"	3"	6"	6"	1,838	1,596
FB-1251	62.5	1,250	20:1	1,203	1,046	96.4%	96.2%	78"	30"	56-1/2"	57-3/4"	66-1/8"	11-7/8"	11-3/8"	11-1/4"	51-3/8"	13"	8-3/4"	26-3/4"	21-5/8"	49-1/2"	6-1/2"	1-1/2"	3"	6"	6"	1,375	1,648
FB-1501	60	1,500	25:1	1,443	1,255	96.4%	96.2%	78"	30"	67-3/4"	68"	65-3/8"	12-3/8"	11-3/8"	11-1/4"	62-3/8"	15-7/8"	9"	26-7/8"	27-7/8"	59-1/4"	5-1/8"	1-1/2"	4"	8"	8"	2,307	1,961
FB-1751	70	1,750	25:1	1,684	1,464	96.4%	96.2%	78"	30"	66-1/4"	68"	65-3/8"	12-3/8"	11-3/8"	11-1/4"	61-1/2"	15-7/8"	9"	27"	27-1/8"	58-3/4"	5-1/8"	1-1/2"	4"	8"	8"	2,458	2,017
FB-2001	80	1,999	25:1	1,923	1,672	96.4%	96.2%	78"	30"	66-1/2"	68"	65-3/8"	12-3/8"	11-3/8"	11-1/4"	61-1/2"	15-7/8"	9"	27"	26-3/4"	58-3/4"	5-1/8"	1-1/2"	4"	8"	8"	2,570	2,087
FB-2501	125	2,500	20:1	2,400	2,087	96.1%	96.0%	77-3/4"	35"	83-3/4"	83-3/4"	83-3/4"	13-1/2"	11-1/4"	10-1/2"	76-1/4"	19-3/4"	9-1/4"	28-3/4"	32"	71"	7-1/4"	2"	4"	8"	9"	3,600	2,577
FB-3001	150	3,000	20:1	2,883	2,507	96.1%	96.0%	77-3/4"	35"	83-3/4"	83-3/4"	83-3/4"	13-1/2"	11-1/4"	10-3/4"	76-1/4"	19-3/4"	9-1/4"	28-3/4"	32"	71"	7-1/4"	2"	4"	10"	10"	3,000	2,881
FB-3501	175	3,500	20:1	3,364	2,975	96.1%	96.0%	77-3/4"	42"	91-1/2"	86-3/4"	83-3/4"	13-1/2"	11-1/4"	10-3/4"	82"	20-1/4"	12-3/4"	35-1/2"	31-3/4"	73-1/4"	8-3/4"	2"	4"	10"	10"	4,600	3,218
FB-4001	333.3	3,999	12:1	3,843	3,342	96.1%	96.0%	77-3/4"	45-1/2"	105-1/2"	99"	83-1/2"	13-3/4"	11-1/2"	10-3/4"	94"	24-3/4"	13-1/2"	39-1/2"	42-1/4"	85-1/4"	10-1/2"	2-1/2"	4"	12"	12"	5,200	3,805
FB-5001	499.9	4,999	10:1	4,804	4,177	96.1%	96.0%	77-3/4"	46-1/2"	102-1/4"	99-1/2"	83-1/2"	13-3/4"	11-1/2"	10-3/4"	92-1/2"	22"	14"	39-3/4"	39-1/2"	84"	9"	2-1/2"	6"	14"	14"	5,900	4,101
FB-6001	600	6,000	10:1	5,766	5,014	96.1%	96.0%	77-3/4"	50"	102-3/4"	99-3/4"	83-1/4"	14-3/4"	11-1/2"	10-3/4"	93-1/4"	20"	15-3/4"	43-1/2"	36-1/2"	83-3/4"	9-1/4"	3"	6"	14"	14"	6,900	4,711

Information subject to change without notice. Dimensions shown are approximate and should not be used for construction purposes.

	FB-0751	FB-1001	FB-1251	FB-1501	FB-1751	FB-2001
WATER						
GALLON CAPACITY	73	77	87	94	106	111
HEATING SURFACE (SQ. FT.)	87	114.7	140.5	162.3	186	197.8
INLET WATER CONNECTION	3" Flanged	3" Flanged	3" Flanged	4" Flanged	4" Flanged	4" Flanged
OUTLET WATER CONNECTION	3" Flanged	3" Flanged	3" Flanged	4" Flanged	4" Flanged	4" Flanged
DRAIN	1 1/2	1 1/2	1 1/2	1 1/2	1 1/2	1 1/2
MAXIMUM FLOW RATE (GPM)	350	350	350	350	350	350
ABSOLUTE MINIMUM FLOW RATE (GPM)	18	18	18	25	25	25
20°F AT WATER FLOW (GPM)	72	96	120	144	168	192
HEAD LOSS (FT. OF HD.)	4.8	8.3	9.2	12.3	13.8	14.5
40°F AT WATER FLOW (GPM)	36	48	60	72	84	96
HEAD LOSS (FT. OF HD.)	3.0	6.0	6.0	7.3	8.1	8.1
MAX. WORKING PRESSURE (PSI)	160	160	160	160	160	160
# OF RELIEF VALVES	1	1	1	1	1	1
RELIEF VALVE SIZE	1 1/4	1 1/4	1 1/4	1 1/4	1 1/4	1 1/2
RELIEF VALVE RATING (ASH)	1,954	1,954	1,954	1,954	1,954	1,954
RELIEF VALVE PRESSURE RATING (PSI)	50	50	50	50	50	50
GAS						
BTU/HR IN-PUT	750,000	999,000	1,250,000	1,500,000	1,750,000	1,999,000
BTU/HR OUTPUT (HIGH FIRE)	722,000	961,000	1,203,000	1,443,000	1,684,000	1,923,000
BTU/HR OUTPUT (LOW FIRE)	48,100	48,100	60,150	57,720	67,360	76,920
HORSE POWER (IN-PUT)	22	30	37	45	52	60
INLET CONNECTION	1 1/4	1 1/4	1 1/2	1 1/2	1 1/2	1 1/2
MAX. INLET PRESSURE, NAT	14" w.c.	14" w.c.	14" w.c.	14" w.c.	14" w.c.	14" w.c.
MIN. INLET PRESSURE, NAT	4" w.c.	4" w.c.	4" w.c.	4" w.c.	4" w.c.	4" w.c.
MAX. INLET PRESSURE, LP	14" w.c.	14" w.c.	14" w.c.	14" w.c.	14" w.c.	14" w.c.
MIN. INLET PRESSURE, LP	8" w.c.	8" w.c.	8" w.c.	8" w.c.	8" w.c.	8" w.c.
ELECTRICAL *						
VOLTAGE/FEATER (VAC)	120V/1PH/60Hz	120V/1PH/60Hz	120V/1PH/60Hz	120V/1PH/60Hz	120V/1PH/60Hz	120V/1PH/60Hz
VOLTAGE/CONTROL (VAC)	24	24	24	24	24	24
TOTAL AMP/PS (FLA)	5	6	7	10	10	13
MINIMUM CIRCUIT AMP/PS (MCA)	6	8	9	13	13	16
# OF ELECTRICAL CONNECTIONS	1	1	1	1	1	1
DIMENSIONS						
HEIGHT	78	78	78	78	78	78
WIDTH	30	30	30	30	30	30
DEPTH	57 5/8	57 5/8	57 3/4	68	68	68
SHIPPING WEIGHT (lbs.)	1,560	1,596	1,648	1,961	2,017	2,087
OPERATING WEIGHT (lbs.)	1,768	1,828	1,975	2,207	2,458	2,570
SERVICE CLEARANCES (RECOMMENDED)						
FRONT	30	30	30	30	30	30
REAR	24	24	24	24	24	24
RIGHT SIDE	24	24	24	24	24	24
LEFT SIDE	24	24	24	24	24	24
TOP	24	24	24	24	24	24
DIRECT VENTING						
VENT SIZE	6	6	8	8	8	8
AIR INLET SIZE	6	6	6	8	8	8
VENT CATEGORY	II cr IV	II cr IV	II cr IV	II cr IV	II cr IV	II cr IV
VENT MATERIAL	SS, CPVC, PVC, Polypro	SS, CPVC, PVC, Polypro	SS, CPVC, PVC, Polypro	SS, CPVC, PVC, Polypro	SS, CPVC, PVC, Polypro	SS, CPVC, PVC, Polypro

* Electrical - For alternate voltages and amp draws, please consult the factory or the installation and operation manual.
 Unless otherwise specified dimensions are in inches.
 Lochinvar LLC • 300 Madison Simpson Pkwy • Lebanon, TN 37090 • 615-889-8500 / Fax: 615-517-1000
www.Lochinvar.com



Lochinvar[®]
HIGH EFFICIENCY BOILERS & WATER HEATERS

**CONDENSATE
NEUTRALIZATION KIT**

Submittal Sheet

CON-Sub-04

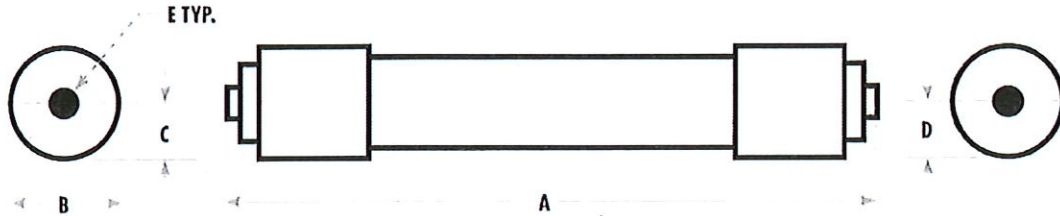
CONDENSATE NEUTRALIZATION KITS FOR BOILERS UP TO 6.0 MBTU

Job Name: Robertsville Middle School Model No. CN4-2000
 Location: Oakridge Tn **NOTES:**
 Engineer: Bedinger
 Agent/Whls: _____
 Contractor: _____

STANDARD FEATURES

- Clear tube for visual inspection
- Integrated unions with o-rings
- Calcite and magnesium oxide media
- Recharge kits sold separately
- Includes PVC adapters
- Includes mounting brackets for 2" tube style

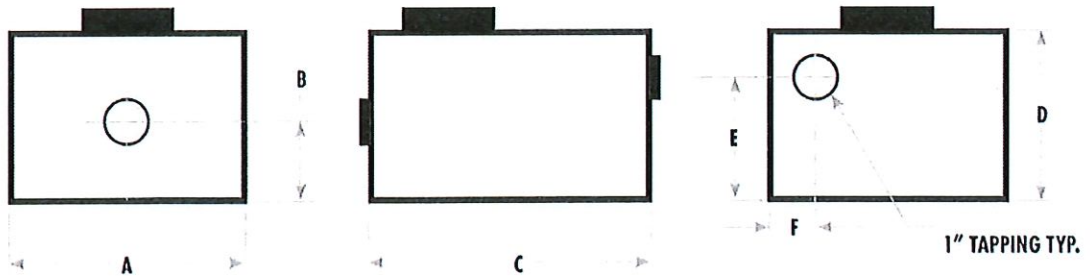
MODEL
CN2-300
CN4-850
CN4-2000



SAP NO.	BTU/HR RANGE	MODEL NO.	A	B	C	D	E	F	RECHARGE KIT
∅ 100289339	0 - 300,000	CN2-300	18-3/4"	2-3/4"	1-3/8"	1-3/8"	1/2" FNPT	—	100295915
∅ 100289340	400,000 - 850,000	CN4-850	15-3/4"	5"	2-1/2"	2-1/2"	3/4" FNPT	—	100295916
✓ 100289581	1,000,000 - 2,000,000	CN4-2000	26-3/4"	5"	2-1/2"	2-1/2"	3/4" FNPT	—	100295917
∅ 100289582	2,500,000 - 6,000,000	CN6T	12"	1-3/4"	15"	8"	5-3/4"	2-1/2"	100295918

All dimensions +/- 1/8"

MODEL
CN6T



Lochinvar[®]
HIGH EFFICIENCY BOILERS & WATER HEATERS

Lochinvar, LLC
300 Maddox Simpson Parkway
Lebanon, Tennessee 37090
P: 615.889.8900 / F: 615.547.1000
Lochinvar.com



VARIABLE SPEED PUMP

Job Name: Robertsville Middle School Model No. _____

Location: _____ Equipment Tag(s): _____

Engineer: _____

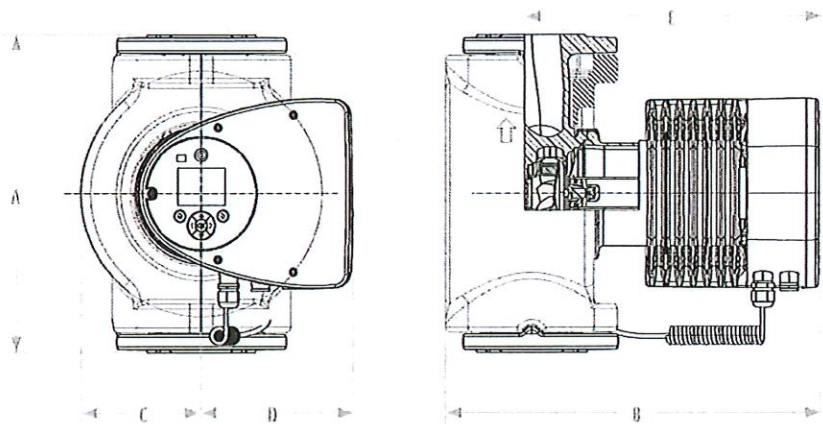
Agent/Wholesaler: _____

Contractor: _____

NOTES:

STANDARD FEATURES

- Digital Display
- Composite Rotor Can
- 316 L Stainless Steel Shaft
- Composite Impeller
- Cast Iron Housing
- Pump Status Indicator
- Alarm Contacts



SAP Part No.	Magna 3 Model	Volt	Max Amps	Pipe Size	A	B	C	D	E
100208411	40-80	115 VAC	2.5	1-1/2"	8-1/2"	14-3/4"	4-1/4"	6-1/2"	12"
100208412	50-150	115 VAC	5.6	2"	11"	15-3/4"	5"	6-1/2"	12"
100277760	80-100	208/230 VAC 1PH	4.6	3"	14-1/4"	17"	6-1/2"	6-1/2"	12-1/2"
100327104	100-120	208/230 VAC 1PH	7.0	4"	17-3/4"	17-3/4"	7"	6-1/2"	13"

Information subject to change without notice. Dimensions shown are approximate and should not be used for construction purposes.

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: RMS Boiler Replacement
RFP 24-010

Bid Opening: 2:00 PM EDT, May 29, 2024

Company Name: Premier Boiler & Combustion, LLC

Address: 788 Old Mill Rd.
Ringgold, GA 30136

Phone Number: 423 - 509 - 2412

Email: mstewart@premierboiler.com

Signature: 

Title: Mechanical Engineer

Date: 5/28/24

Main Bid: *This price is to be for the complete specified equipment and installation as outlined within this RFP 24-010. ALL COSTS ARE TO BE INCLUDED IN THE FINAL PRICE.*

Bid Amount: RMS Boiler Replacement \$356,725.¹⁰ USD

Please attach detailed specification

HOLD HARMLESS AGREEMENT

This Hold Harmless Agreement is between Premier Boiler & Combustion
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: Premier Boiler & Combustion LLC
By: Matt Stewart

Title: Mechanical Engineer

STATE OF ~~TN~~ GA
County of Catoosa

Matt Stewart 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 instrument on behalf of

Premier Boiler & Combustion LLC
M. Stewart

Signature

Witness by hand and Notaries seal at office this 28th day of May
year of 2024.

Allen
Notary Public

JO ALLEN
NOTARY PUBLIC
Catoosa County
State of Georgia
My Comm Expires October 31, 2026

My Commission Expires: 10/31/2026

NON-COLLUSION AFFIDAVIT

NON-COLLUSION AFFIDAVIT TO BE EXECUTED
BY CONTRACTOR

State of GA

County of Catoosa

Premier Boiler + Combustion, 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 28th day

of May, 2024.

M. Stewart
Signature of Officer

Jo Allen
Notary Signature

Matt Stewart
Typed Name of Officer

Premier Boiler + Combustion LLC
Office

JO ALLEN
NOTARY PUBLIC
Catoosa County
State of Georgia
My Comm. Expires October 31, 2026

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.

CRIMINAL BACKGROUND COMPLIANCE AFFIDAVIT

STATE OF GA

COUNTY OF Catoosa

The undersigned, principal officer of Premier Boiler & Combustion 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 Premier Boiler (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 GA

COUNTY OF Catoosa

Before me personally appeared Matt Stewart 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 28 day of May, 2024.

Notary Public

My commission expires: 10/31/2026

JO ALLEN
NOTARY PUBLIC
Catoosa County
State of Georgia
My Comm Expires October 31, 2026

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.

M. Stewart
Signature

5/28
Date

Matt Stewart
Printed Name

Mech. Engineer
Title

Premier Boiler + Combustion LLC
Name of Firm/Company

*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 GA COUNTY OF Catoosa

The undersigned, principal officer of Premier Boiler & Combustion, 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 Premier Boiler & Combustion (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: Matt Stewart

STATE OF GA

COUNTY OF Catoosa

Before me personally appeared Matt Stewart

_____ with whom I am personally acquainted (or proved to me on the basis of satisfactory evidence), and who acknowledged that he/she is the Principal officer of Premier Boiler & Combustion 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 28 day of May, 2024

Notary Public: [Signature]
My commission expires 10/31/2026

JO ALLEN
NOTARY PUBLIC
Catoosa County
State of Georgia
My Comm. Expires October 31 2026

**Request for Taxpayer
 Identification Number and Certification**

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

► Go to 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.
Premier Boiler & Combustion, LLC.

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) ► P

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 US)

5 Address (number, street, and apt. or suite no.) See instructions.
788 Old Mill Rd

6 City, state, and ZIP code
Ringgold, GA 30736

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

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

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

Social security number

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

or

Employer identification number

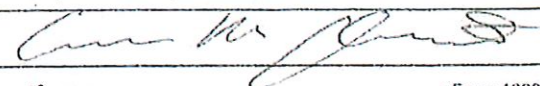
8	2	-	4	2	3	3	5	4	4
---	---	---	---	---	---	---	---	---	---

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 ► 4/20/23

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.

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.

Document A310™ – 2010

Conforms with The American Institute of Architects AIA Document 310

Bid Bond

CONTRACTOR:

(Name, legal status and address)

Premier Boiler and Combustion, LLC
778 Old Mill Road
Ringgold, GA 30736

SURETY:

(Name, legal status and principal place of business)

Merchants National Bonding, Inc.
6700 Westown Pkwy.
West Des Moines, IA 50266
Mailing Address for Notices

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

OWNER:

(Name, legal status and address)

Oak Ridge Schools - Board of Education
304 New York Ave
Oak Ridge, TN 37830

Any singular reference to Contractor, Surety, Owner or other party shall be considered plural where applicable.

BOND AMOUNT: Five (5%) Percent of the amount bid

PROJECT:

(Name, location or address, and Project number, if any)

Robertsville Middle School Boiler Replacement
RFP 24-010

The Contractor and Surety are bound to the Owner in the amount set forth above, for the payment of which the Contractor and Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally, as provided herein. The conditions of this Bond are such that if the Owner accepts the bid of the Contractor within the time specified in the bid documents, or within such time period as may be agreed to by the Owner and Contractor, and the Contractor either (1) enters into a contract with the Owner in accordance with the terms of such bid, and gives such bond or bonds as may be specified in the bidding or Contract Documents, with a surety admitted in the jurisdiction of the Project and otherwise acceptable to the Owner, for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof; or (2) pays to the Owner the difference, not to exceed the amount of this Bond, between the amount specified in said bid and such larger amount for which the Owner may in good faith contract with another party to perform the work covered by said bid, then this obligation shall be null and void, otherwise to remain in full force and effect. The Surety hereby waives any notice of an agreement between the Owner and Contractor to extend the time in which the Owner may accept the bid. Waiver of notice by the Surety shall not apply to any extension exceeding sixty (60) days in the aggregate beyond the time for acceptance of bids specified in the bid documents, and the Owner and Contractor shall obtain the Surety's consent for an extension beyond sixty (60) days.

If this Bond is issued in connection with a subcontractor's bid to a Contractor, the term Contractor in this Bond shall be deemed to be Subcontractor and the term Owner shall be deemed to be Contractor.

When this Bond has been furnished to comply with a statutory or other legal requirement in the location of the Project, any provision in this Bond conflicting with said statutory or legal requirement shall be deemed deleted herefrom and provisions conforming to such statutory or other legal requirement shall be deemed incorporated herein. When so furnished, the intent is that this Bond shall be construed as a statutory bond and not as a common law bond.

Signed and sealed this 29th day of May, 2024

(Witness)

Shawn Carlisi

(Witness)

Premier Boiler and Combustion, LLC

(Principal)

(Seal)

By: *M. Stovall*

(Title)

Merchants National Bonding, Inc.

(Surety)

(Seal)

By: *Patricia S. Kleehammer*

(Title)

Patricia S. Kleehammer, Attorney-in-Fact



MERCHANTS
BONDING COMPANY™
POWER OF ATTORNEY

Know All Persons By These Presents, that MERCHANTS BONDING COMPANY (MUTUAL) and MERCHANTS NATIONAL BONDING, INC., both being corporations of the State of Iowa, d/b/a Merchants National Indemnity Company (in California only) (herein collectively called the "Companies") do hereby make, constitute and appoint, individually,

John Brock; Patricia S Kleehammer

their true and lawful Attorney(s)-in-Fact, to sign its name as surety(ies) and to execute, seal and acknowledge any and all bonds, undertakings, contracts and other written instruments in the nature thereof, on behalf of the Companies in their business of guaranteeing the fidelity of persons, guaranteeing the performance of contracts and executing or guaranteeing bonds and undertakings required or permitted in any actions or proceedings allowed by law.

This Power-of-Attorney is granted and is signed and sealed by facsimile under and by authority of the following By-Laws adopted by the Board of Directors of Merchants Bonding Company (Mutual) on April 23, 2011 and amended August 14, 2015 and adopted by the Board of Directors of Merchants National Bonding, Inc., on October 16, 2015.

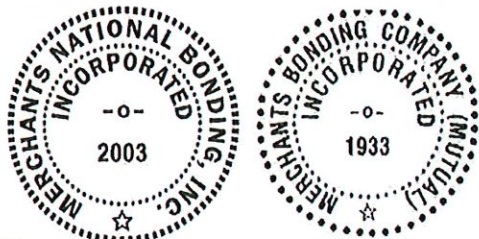
"The President, Secretary, Treasurer, or any Assistant Treasurer or any Assistant Secretary or any Vice President shall have power and authority to appoint Attorneys-in-Fact, and to authorize them to execute on behalf of the Company, and attach the seal of the Company thereto, bonds and undertakings, recognizances, contracts of indemnity and other writings obligatory in the nature thereof."

"The signature of any authorized officer and the seal of the Company may be affixed by facsimile or electronic transmission to any Power of Attorney or Certification thereof authorizing the execution and delivery of any bond, undertaking, recognizance, or other suretyship obligations of the Company, and such signature and seal when so used shall have the same force and effect as though manually fixed."

In connection with obligations in favor of the Florida Department of Transportation only, it is agreed that the power and authority hereby given to the Attorney-in-Fact includes any and all consents for the release of retained percentages and/or final estimates on engineering and construction contracts required by the State of Florida Department of Transportation. It is fully understood that consenting to the State of Florida Department of Transportation making payment of the final estimate to the Contractor and/or its assignee, shall not relieve this surety company of any of its obligations under its bond.

In connection with obligations in favor of the Kentucky Department of Highways only, it is agreed that the power and authority hereby given to the Attorney-in-Fact cannot be modified or revoked unless prior written personal notice of such intent has been given to the Commissioner-Department of Highways of the Commonwealth of Kentucky at least thirty (30) days prior to the modification or revocation.

In Witness Whereof, the Companies have caused this instrument to be signed and sealed this 28th day of March, 2023.

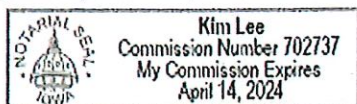


MERCHANTS BONDING COMPANY (MUTUAL)
MERCHANTS NATIONAL BONDING, INC.
d/b/a MERCHANTS NATIONAL INDEMNITY COMPANY

By *Larry Taylor*
President

STATE OF IOWA
COUNTY OF DALLAS ss.

On this 28th day of March, 2023, before me appeared Larry Taylor, to me personally known, who being by me duly sworn did say that he is President of MERCHANTS BONDING COMPANY (MUTUAL) and MERCHANTS NATIONAL BONDING, INC.; and that the seals affixed to the foregoing instrument are the Corporate Seals of the Companies; and that the said instrument was signed and sealed in behalf of the Companies by authority of their respective Boards of Directors.



Kim Lee
Notary Public

(Expiration of notary's commission does not invalidate this instrument)

I, William Warner, Jr., Secretary of MERCHANTS BONDING COMPANY (MUTUAL) and MERCHANTS NATIONAL BONDING, INC., do hereby certify that the above and foregoing is a true and correct copy of the POWER-OF-ATTORNEY executed by said Companies, which is still in full force and effect and has not been amended or revoked.

In Witness Whereof, I have hereunto set my hand and affixed the seal of the Companies on this 29th day of May, 2024.



William Warner Jr.
Secretary



Oak Ridge Schools
TEACHING AND LEARNING

MEMORANDUM

Dr. Kelly Williams

Executive Director, Office of Teaching and Learning

TO: Board of Education

DATE: 6/7/24

SUBJECT: Item for Action: Approval to Purchase iPads for K-1 Refresh

I recommend the approval for the purchase of 800 iPads for grades K-1. The current iPads are four years old and out of warranty. The purchase of refresh devices includes a 4-year AppleCare+ for Schools warranty.

This purchase was approved as part of the FY25 budget and will be paid from account 141-71100-722-000-00000-226 in the amount of \$346,400.



OAK RIDGE SCHOOLS

Technology Department

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



MEMORANDUM

Date: May 31, 2024

To: Kelly Williams

From: Doug Cofer 

Subject: K-1 iPad Refresh

I recommend the approval for the purchase of iPads from Apple in the amount of \$346,400. The current iPads are 4 years old and out of warranty. The purchase was approved in the FY25 budget and would come from account 141-71100-722-000-00000-226.

Apple is a sole source for iPad purchases form private and public K-12 institutions in the US.



APPLE CONFIDENTIAL

May 31, 2024

RE: Apple Sole Source Letter

Oak Ridge Schools
Susan Dundore, Administrative Assistant to Doug Cofer
304 New York Ave
Oak Ridge, TN 37830

Dear Susan:

The purpose of this Apple Sole Source Letter is to inform you and your organization that Apple Inc. ("Apple") is the sole source provider of Apple Products for private and public K-12 education institutions in the United States with a few limited exceptions.

"Apple Products" refers to Services, CTO Products, hardware and software products manufactured, distributed, or licensed under an Apple-owned or licensed brand name that an Apple customer has paid to acquire or has properly licensed from Apple for its own use, but excluding any third-party software and all other third party products.

"Services" means collectively, the standard, price-listed services, support, and/or training products sold under the Apple brand name. "Configure-To-Order Products" or "CTO Products" means Products that Apple modifies from its standard configurations and that are available to an Apple customer only by special order.

The only source of Apple Products for private or public K-12 education institutions is Apple with a few limited exceptions. Only a handful of strategic resellers, such as AT&T, Sprint, T-Mobile, and Verizon, are authorized to sell Apple Products to private and public K-12 education institutions in the United States.

Apple will continue to have a direct sales and purchasing relationship with K-12 education institutions and, aside from a very small number of exceptions, will continue to be the sole source for all of the Apple Products sold to K-12 education institutions.

Apple may change or update this letter in its sole discretion.

Sincerely,

A handwritten signature in black ink, appearing to read "Johnny Mendoza", is positioned above the typed name.

Johnny Mendoza
Apple Inc.
U.S. Contract Operations - WW Legal/Commercial



Apple Inc. Education Price Quote

Customer:
 Susan Dundore
 OAK RIDGE SCHOOLS
 Phone: 1865-425-9036
 Email: swdundore@ortn.edu

Apple Inc:
 Eileen Crowley
 Email: ecrowley@apple.com

Apple Quote:
 2212826771

Quote Date:
 May 31, 2024

Quote Valid Until:
 June 30, 2024

Quote Comments:

Item #	Details	Qty	Unit List Price	Extended List Price
1	10.9-inch iPad Wi-Fi 64GB – Silver (Packaged in a 10-pack) Part Number: MPQT3LL/A	800	\$324.00	\$259,200.00
2	4-Year AppleCare+ for Schools – iPad / iPad Air / iPad mini Part Number: S7828LL/A	800	\$109.00	\$87,200.00

Education List Price Total	\$346,400.00
Additional Tax	\$0.00
Estimated Tax	\$0.00
Total Tax	\$0.00
Extended Total Price*	\$346,400.00

**In most cases Extended Total Price does not include Sales Tax
 If applicable, eWaste/Recycling Fees are included. Standard shipping is complimentary

[Terms & Use](#) | [Privacy Policy](#) | [Return Policy](#)

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: 5/30/2024

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: ORHS Boys Basketball

Educational Activity: Team camp and exposure to Wake Forest University

Destination: Wake Forest University

Purpose of Trip: Team Camp

Departure Date: 6/14/2024 Departure Time: 6:00AM

Return Date: 6/15/2024 Return Time: 8:00PM

Mode of Transportation: School Vans

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: _____ Phone #: _____

(Only approved transportation companies may be used. Refer to ORS website for list of approved companies)

Air Travel Flight #'s: _____

Hotel/Motel Name: Wake Forest Dorms

Address: 1834 Wake Forest Rd

City: Winston-Salem State: NC Zip: 27109

Phone: (336) 758-5000 Contact Person: _____

Number of Nights: 1 Hotel Rating: College dorms

Name of School Sponsor/Date: Aaron Green

Signature of School Sponsor:  Cell #: 423-595-1829

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: 15

of Adults: 4

Chaperone/Student Ratio: _____

Professional Staff Chaperone(s)

- 1. Name: Aaron Green Cell #: 423-595-1829
- 2. Name: Danny Green Cell #: 423-337-1213
- 3. Name: Ronnie Scott Cell #: 865-599-6970
- 4. Name: Craig Price Cell #: 423-298-6953

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 Acct to be charged for Substitute _____

\$ 140 Per Student TOTAL TRIP AMOUNT: \$ \$300 team Fee*

Provisions for those students unable to pay: _____

Booster club

Other information, comments, and special arrangements: (foreseeable hazards must be identified)

* Team fee paid by booster club

Staff Member: _____

Date: _____

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 Gallardo

Date: 5/31/24

Principal's Action: Approved; Disapproved:

Principal's Signature: Bill Costin

Date: 5.30.24

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: Oak Ridge High School Date: 5-17-24

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: Cheerleading

Educational Activity: UCA Camp

Destination: ETSU - Johnson City, TN

Purpose of Trip: UCA Camp

Departure Date: 7/9/24 Departure Time: 6:00am

Return Date: 7/12/24 Return Time: 4:30pm

Mode of Transportation: Departure - Bus ; Return - Parents

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: n/a

Driver's License Verified by: n/a Attach copy of driver's license

Transportation Contractor: Rocky Top Tours Phone #: 865-428687

(Only approved transportation companies may be used. Refer to ORS website for list of approved companies)

Air Travel Flight #'s: _____

Hotel/Motel Name: ETSU

Address: D.P. Culp University Center PO Box 70692

City: Johnson City State: TN Zip: 37614

Phone: 423-439-1000 Contact Person: n/a

Number of Nights: 3 Hotel Rating: n/a

Name of School Sponsor/Date: Chantel Patrick

Signature of School Sponsor: Chantel Patrick Cell #: 865-973-8840

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: 25

of Adults: 4

Chaperone/Student Ratio: 1:6

Professional Staff Chaperone(s)

- 1. Name: Chantel Patrick Cell #: 865-973-8840
- 2. Name: Julie Hutchison Cell #: 865-742-9825
- 3. Name: Christy Lamon Cell #: 865-659-2019
- 4. Name: _____ Cell #: _____

Other Chaperone(s):

- 1. Name: Zoe Kline Cell #: 865-680-7689
- 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 _____

\$ 425 Per Student TOTAL TRIP AMOUNT: \$ 13,975

Provisions for those students unable to pay: _____

Other information, comments, and special arrangements: (foreseeable hazards must be identified)

Staff Member: Chantel Patrick

Date: 5/17/24

Athletic Director: Janet Melliger for Joe Gaddis

Date: 6/6/2024

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: Janet Melliger for Joe Gaddis

Date: _____

Principal's Action: Approved: Disapproved:

Principal's Signature: Janet Melliger Date: 6-6-2024

Superintendent or Designee's Action: Approved: Disapproved:

Superintendent or Designee's Signature: _____ Date: _____

Board Approval Date (if required): _____



Remit Payment to:

Universal Cheerleaders Association

711 N Front Street, Suite 100
 Memphis, TN 38107
 (888) 243-3782
<https://www.varsity.com/uca/>

Invoice

Inv #	REG-0011313833
Date	05/01/2024
Cust #	12831300
Contact	Chantel Patrick

Billed To: Oak Ridge High School - Varsity Cheer
 1450 Oak Ridge Turnpike
 Oak Ridge, TN 37830

Event Info: East Tennessee State University
 D.P. Culp University Center PO Box 70692
 Johnson City, TN 37614
 07/09/2024 - 07/12/2024

This location requires 1 adult per 10 minors.

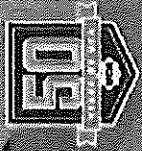
Total Female Athletes: 22	Total Male Athletes: 2	Total Female Mascots: 0	Total Male Mascots: 0	Total Female Coaches: 4	Total Male Coaches: 0	Total Other: 1
Athlete (AT)	Bus Driver (BD)	Chaperone (CP)	Child (CD)	Coach (CO)	Family (FA)	Mascot (MA)

Package Name	Rate	Quantity	Amount
Participant Overnight	\$425.00	24	\$10,200.00
Advisor Overnight	\$425.00	4	\$1,700.00
Chaperone Overnight	\$325.00	1	\$325.00

Package Total: \$12,225.00
Total Registration Amount: \$12,225.00
Amount Paid: \$0.00
Balance Due: \$12,225.00

Balance Due Date: 05/25/2024
Deposit Amount Due: \$2,900.00
Deposit Due Date: 05/10/2024





2024 Traditional Overnight Camp 4-Day Sample Schedule

DAY 1

9 am - 12 pm	Registration		
12:30 pm	Coaches' Quick Meet! - <i>NEW!</i>	8:30 am	Team Leader Check-In / Warmup / Game
1:00 pm	Opening Staff Demo & Meet your Team Leader!	9:15 am	Day Class: Band Chant / Material Review & Coaches' Meeting #2
1:30 pm	Safety Awareness & Stunt Qualification w/ Team Leader	9:30 am	Coaches' & Captain's Goal Setting
1:45 pm	Spotting Seminar	10:30 am	Group A - Band Chant: Setup / Review / Team UCA & St. Jude
2:00 pm	Group A - Motion & Spirit Prop Workshop / Game Day Class: Situational Sidelines / Camp Dance & Coaches' Meeting #1	11:30 am	Lunch
3:00 pm	Group B - Stunt Class #1	1:00 pm	Captains' Leadership Training & Coaches' Stunt Workshop #1
4:00 pm	Group A - Situational Sideline Private Coaching	1:15 pm	Pyramid Class #2
	Group B - Motion Technique Class & Team UCA	2:15 pm	Group A - Crowd Leading Private Coaching
4:30 pm	Dinner	3:15 pm	Group B - Squad Leadership Training & Game Day Jams - <i>NEW!</i>
6:15 pm	Group A - Motion Technique Class & Team UCA	4:15 pm	Switch Groups
	Group B - Situational Sideline Private Coaching	4:30 pm	Sideline Stunts
6:45 pm	Pyramid Class #1	4:30 pm	Dinner
7:45 pm	Game Day Class: Crowd Leading	6:15 pm	Situational Sideline & Crowd Leading Evaluations
8:15 pm	Stunt Troubleshooting Class	6:45 pm	Group A - Stretching, Flexibility & Jump Class & Material Review
8:45 - 9 pm	Team Leader Meetings & Daily Awards <i>New Coaches' Q/A</i>	7:30 pm	Group B - Pyramid Private Coaching
		8:15 pm	Switch Groups
		8:30 pm	Jump Off
			Team Leader Meetings / Squad Credentialing & Daily Awards

DAY 2

	Breakfast	8:30 am	Team Leader Check-In / Warmup / Game
		9:00 am	Day Class: General Sidelines & Diddies! & Coaches' Meeting #3
		9:15 am	Senior Social - <i>NEW!</i>
		10:15 am	Group A - Stunt Class #3
		11:15 am	Group B - Team UCA & FNL Frenzy!
		11:30 am	Lunch
		1:15 pm	Group A - Team Unity & Spirit Practice
		2:15 pm	Group B - Camp Routine Private Coaching
		3:15 pm	Switch Groups
		4:00 pm	Electives*
		4:30 pm	All-American Tryouts
		6:15 pm	Dinner
		6:45 pm	Camp Routine Evaluations
		7:15 pm	Group A - Spirit Private Coaching
		7:45 pm	Group B - Drills for Skills
		8:00 pm	Switch Groups
		8:30 pm	Gatorade Break
			Spirit Night!
			Squad Credentialing / Daily Awards & Pin It Forward
			Final Coaches' Q&A

DAY 3

	Breakfast	8:30 am	Team Leader Check-In / Warmup / Game
		9:00 am	Day Class: General Sidelines & Diddies! & Coaches' Meeting #3
		9:15 am	Senior Social - <i>NEW!</i>
		10:15 am	Group A - Stunt Class #3
		11:15 am	Group B - Team UCA & FNL Frenzy!
		11:30 am	Lunch
		1:15 pm	Group A - Team Unity & Spirit Practice
		2:15 pm	Group B - Camp Routine Private Coaching
		3:15 pm	Switch Groups
		4:00 pm	Electives*
		4:30 pm	All-American Tryouts
		6:15 pm	Dinner
		6:45 pm	Camp Routine Evaluations
		7:15 pm	Group A - Spirit Private Coaching
		7:45 pm	Group B - Drills for Skills
		8:00 pm	Switch Groups
		8:30 pm	Gatorade Break
			Spirit Night!
			Squad Credentialing / Daily Awards & Pin It Forward
			Final Coaches' Q&A

DAY 4

	Breakfast	8:30 am	Optional Open Practice
		9:00 am	Team Time w/ Team Leader
		9:30 am	Camp Routine Championship
		10:15 am	Spirit Championship
		11:00 am	• Band Chant
		11:15 am	• Situational Sideline
		11:30 am	• Crowd Leading
			Squad Credentialing Presentation
			Senior Recognition Ceremony
			Final Awards & Pin It Forward

- Elective Classes***
- Timeout Dance
 - Hip Hop Dance
 - Stunt Transitions
 - Additional Material
 - Basket Toss Class
 - Open Workshop





Rocky Top Tours
445 Continental Drive
Maryville, TN 37804
865-970-3474
865-429-8687

(Fax: 865-980-8122)
www.rockytop tours.com
mike@rockytop tours.com

Quote

Oak Ridge High School
Chantel Patrick (865-973-8840)
1450 Oak Ridge Turnpike
Oak Ridge, TN 37830

Quote # Q549

Date Printed: Friday, April 19, 2024
PO #:
Group Name: CHEER CAMP
Phone: 865-425-9601 Fax:
Salesperson: Mike Bayless
Salesperson Email: mike@rockytop tours.com

		Time	Date	# Vehicles	Description	Total Capacity
Pickup	Oak Ridge High School 1450 Oak Ridge Turnpike Oak Ridge, TN	8:30am	7/9/2024	1	H3-45	56
Dropoff	East Tennessee State University 1276 Gilbreath Drive Johnson City, TN	8:00pm	7/9/2024			56

Your Charter Includes:	# Units	Cost/Unit	Total	Note
Flat Rate	1.00	1750.00	1750.00	
Cost of Charter: \$		1,750.00		

Itinerary:

Option # 3 One-Way Transfer = \$1750.00

Terms & Conditions

- This quote is based on the information given at the time of the request. In the event extra mileage, time, or days are added to the trip the costs incurred will be applied to the quoted rate. The group is responsible to provide individual lodging (hotel) for each night of the trip for the driver(s) assigned to overnight trips. In some cases, a "Day Room" must be provided. The group is also responsible for any tolls, entrance fees for the bus, City Permits, or parking fees during the trip.
- The USDOT limits drivers to a total of 15 hours of on-duty time each day in which no more than 10 hours can be driving. Drivers must have 9 consecutive hours off prior to beginning their next duty status.
- Rocky Top Tours will not be liable for loss of time due to bad weather conditions, mechanical failure, or schedule changes during the trip.
- The company is not responsible for items left on the coach. We ask that the group leader, along with the driver, is to inspect the coach at the end of the charter for items left or for any damage. The Chartering Party will be held responsible for any damage to the motorcoach caused by a member of its group.
- Food and drinks (WATER ONLY) are permitted on the bus as long as the group disposes of trash in provided receptacles or bags. All drinks must be in a bottle with a screw top cap. The driver has the authority to refuse passengers on board with food & drink if the bus is not properly maintained during the trip. A minimum clean up fee of \$250.00 will be assessed if the motorcoach returns in a "trashed" condition and cannot be cleaned in a reasonable time. Clean up fees may be more in the event that the bus needs a complete detail.
- All buses/vans are booked on a first come-first served basis. We will do our best, but cannot guarantee requested vehicles or drivers. We reserve the right to sublease vehicles for this charter in the event any of unseen issues that may arise.
- Audio, Video, and Wi-Fi are provided as a complimentary service. We make every effort to see that these services are in working condition prior to the start of each trip however electronics do fail on occasion. There will be no refunds in the event of disruption of these services.
- A signed confirmation and deposit will be due at upon making reservation.
- Final payment will be due 10 days prior to the start of service along with the itinerary for the trip. A 3% Convenience Fee will be added to Credit Card payments.

To confirm this quote and make it a confirmation, please sign and return this document. If you have any questions please contact Mike Bayless at 865-970-3474

Signature

Chantel Patrick

Date

4/25/24

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: 5/27/24

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: Volleyball Team

Educational Activity: University of Kentucky Team Skills Camp

Destination: Lexington, KY

Purpose of Trip: Participate in team skills and rapport building camp

Departure Date: 7/12/24 Departure Time: 8am

Return Date: 7/14/24 Return Time: 9pm

Mode of Transportation: School System Van

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: Audrey Sherles

Driver's License Verified by: _____ 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: Dorm Residence Hall (TBD by university)

Address: Do not have an address at this time as dorm halls have not been assigned.

City: Lexington State: KY Zip: 40506

Phone: _____ Contact Person: Kristin Vicini

Number of Nights: 2 Hotel Rating: campus housing

Name of School Sponsor/Date: Audrey Sherles 5/27/24

Signature of School Sponsor: *Audrey Sherles* Cell #: 865-314-3161

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: 12 # of Adults: 2 Chaperone/Student Ratio: 1:6

Professional Staff Chaperone(s)

1. Name: Audrey Sherles Cell #: 865-314-3161
2. Name: Alex Sherles Cell #: 865-243-5684
3. Name: _____ Cell #: _____
4. Name: _____ Cell #: _____

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 Acct to be charged for Substitute _____
\$ 385 Per Student TOTAL TRIP AMOUNT: \$ 4620

Provisions for those students unable to pay: _____
Students will be able to participate in fundraising efforts to supplement/replace out of pocket pay.

Other information, comments, and special arrangements: (foreseeable hazards must be identified)

Staff Member: _____

Date: _____

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: *Bill Cristup*

Date: 5.29.24

Superintendent or Designee's Action: Approved: Disapproved:

Superintendent or Designee's Signature: _____ Date: _____

Board Approval Date (if required): _____

Oak Ridge Schools

9th Attendance Period

June 1, 2024

These numbers reflect the **2023-2024** Skyward Student Management System (Entity) active student enrollment count as of **June 1, 2024**.

The total includes **53** private school and home-schooled students receiving Special Ed services.



Oak Ridge Schools

Enrollment Entity Counts 9th RP 2023-24

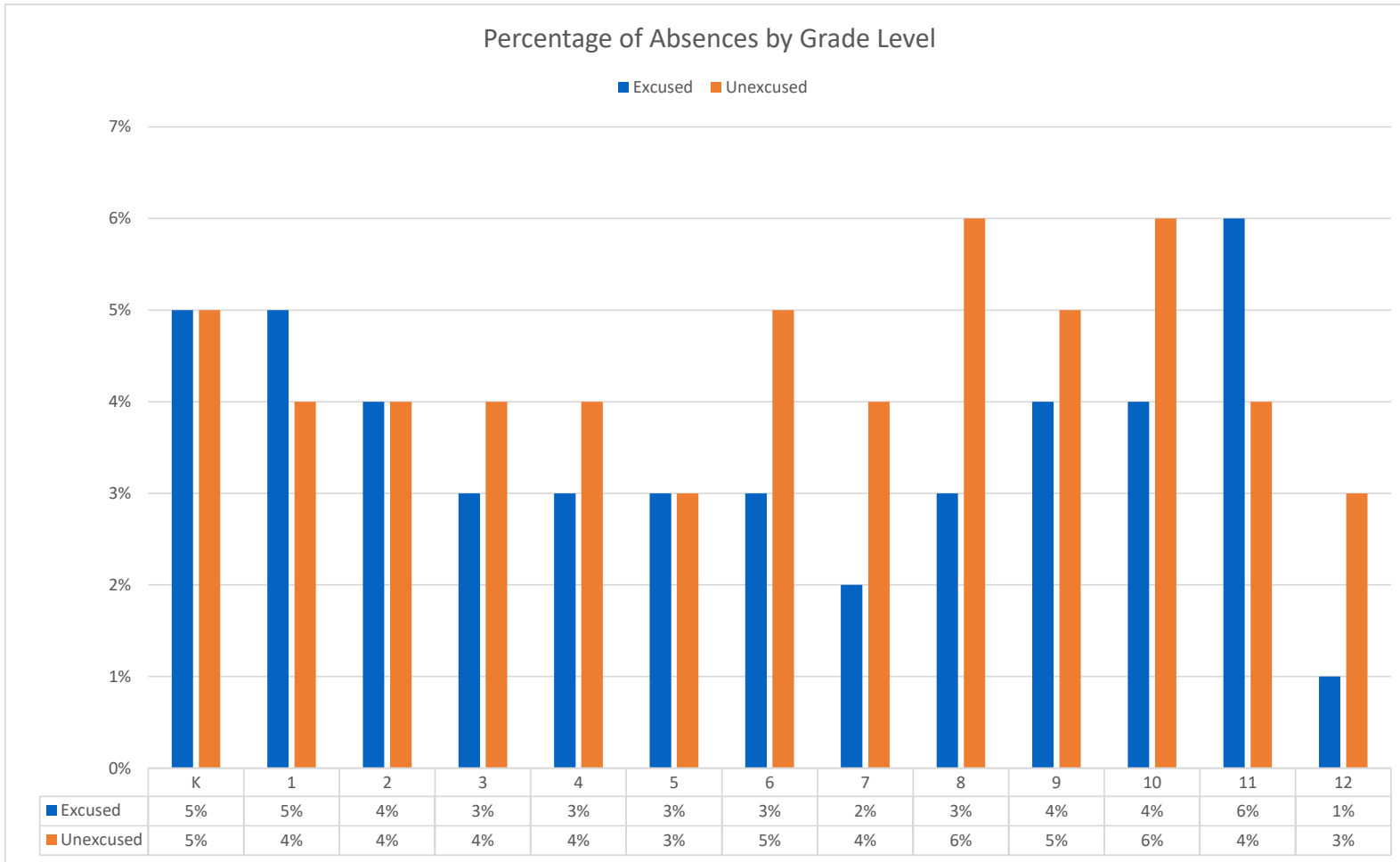
June 1, 2024

School	P3	P4	K	1	2	3	4	5	6	7	8	9	10	11	12	Total PK-12 2023-24	Previous 8th RP 2023-24	Diff	Total PK-12 2022-23
Preschool	129	120														249	256	-7	229
Glenwood			71	81	74	63	77									366	367	-1	335
Linden			106	102	102	96	116									522	524	-2	544
Willow Brook			95	79	86	87	84									431	434	-3	393
Woodland			81	84	102	102	95									464	467	-3	416
JMS								171	189	161	208					729	730	-1	715
RMS								194	172	177	205					748	752	-4	704
ORHS												407	403	378	362	1550	1554	-4	1537
Enrollment 2023-24	129	120	353	346	364	348	372	365	361	338	413	407	403	378	362	5059	5084	-25	4873
Prev. 8th RP 2023-24	134	122	356	347	366	349	374	366	361	340	415	410	403	379	362	5084			
Difference	-5	-2	-3	-1	-2	-1	-2	-1	0	-2	-2	-3	0	-1	0	-25			

This report compares the 2023-24 9th RP period enrollment with the 2023-24 8th RP period.

Attendance Graphs

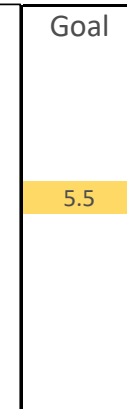
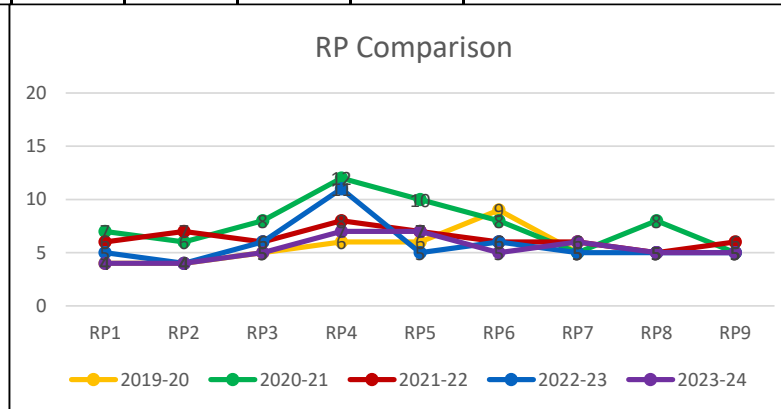
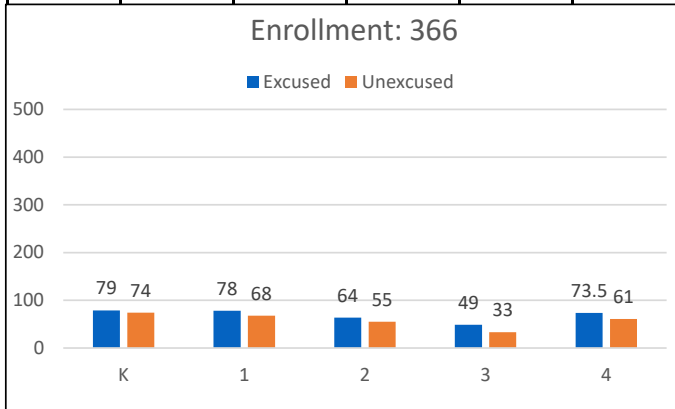
The graphs below display excused and unexcused absence totals, entity counts, and attendance percentages by grade and reporting period.
 The data was compiled using information from attendance detail and summary reports and entity counts reports.
 Reporting Period 9: 5/6/2024-5/29/2024



* Percentages have been rounded to the nearest whole number.

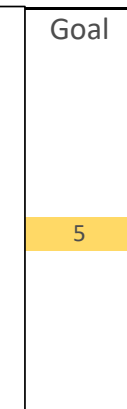
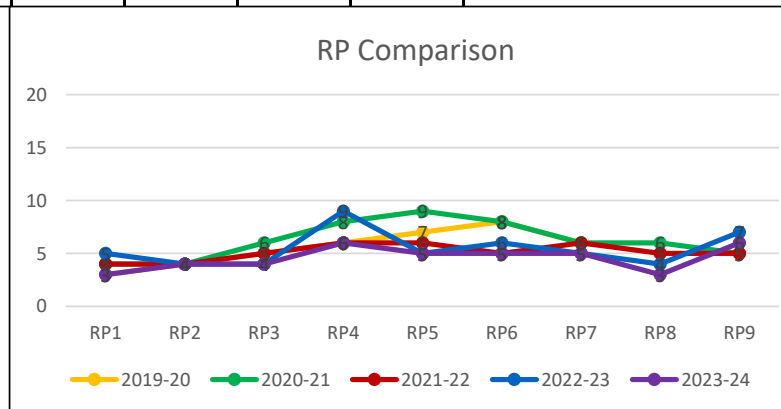
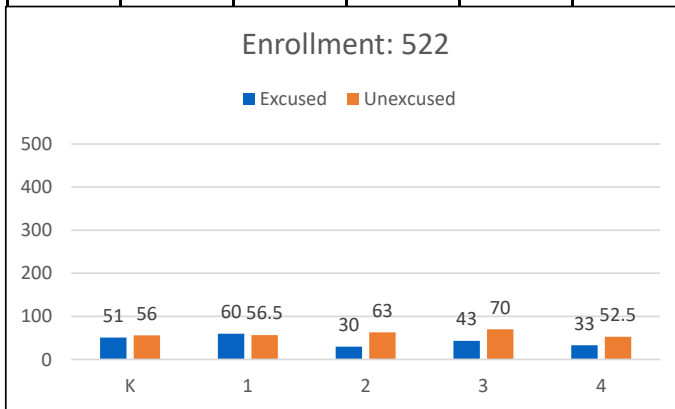
2019-20	RP1: 4%	RP2: 4%	RP3: 5%	RP4: 5.6%	RP5: 6%	RP6: 8.8%	RP7: 4.9%	Covid-19	Covid-19
2020-21	RP1: 7.3%	RP2: 5.8%	RP3: 8.1%	RP4: 11.6%	RP5: 9.9%	RP6: 7.5%	RP7: 5.3%	RP8: 8%	RP9: 5.4%
2021-22	RP1: 6.3%	RP2: 6.7%	RP3: 6.3%	RP4: 7.7%	RP5: 6.9%	RP6: 5.8%	RP7: 6.3%	RP8: 8%	RP9: 5.9%
2022-23	RP1: 4.9%	RP2: 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%	RP7: 6.2%	RP8: 4.7%	RP9: 4.5%

Glenwood



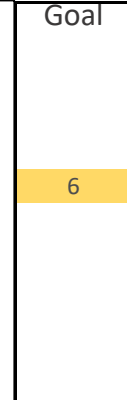
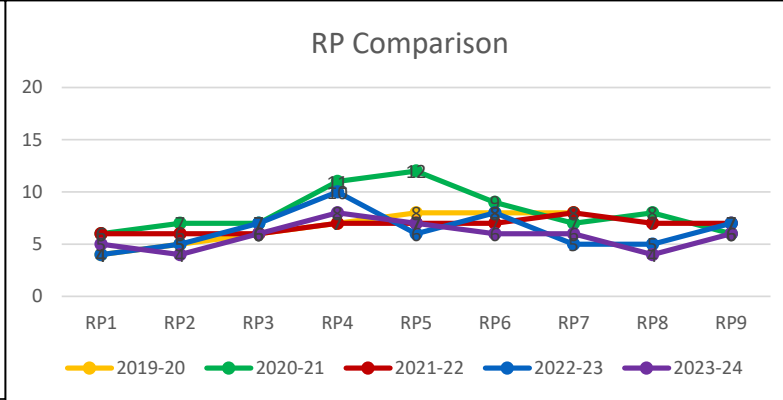
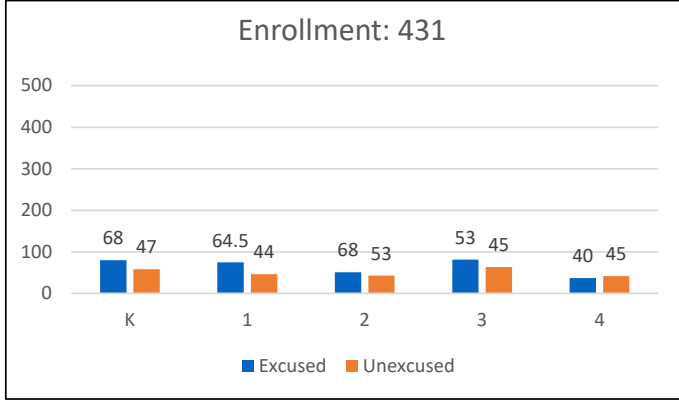
2019-20	RP1: 3%	RP2: 4%	RP3: 5%	RP4: 5.6%	RP5: 6.8%	RP6: 7.7%	RP7: 6.4%	Covid-19	Covid-19
2020-21	RP1: 4.3%	RP2: 4.3%	RP3: 6.1%	RP4: 7.7%	RP5: 9.1%	RP6: 7.9%	RP7: 6.2%	RP8: 5.6%	RP9: 5.3%
2021-22	RP1: 4.4%	RP2: 4.2%	RP3: 4.8%	RP4: 6.4%	RP5: 5.8%	RP6: 4.6%	RP7: 5.5%	RP8: 5.4%	RP9: 5%
2022-23	RP1: 3.2%	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%	RP7: 4.7%	RP8: 3.3%	RP9: 5.8%

Linden



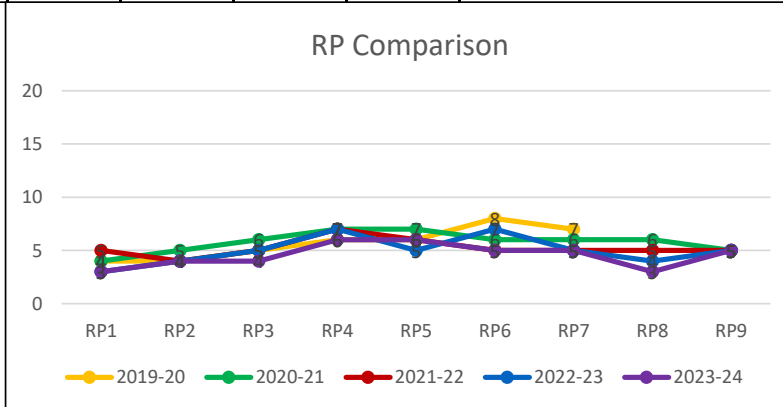
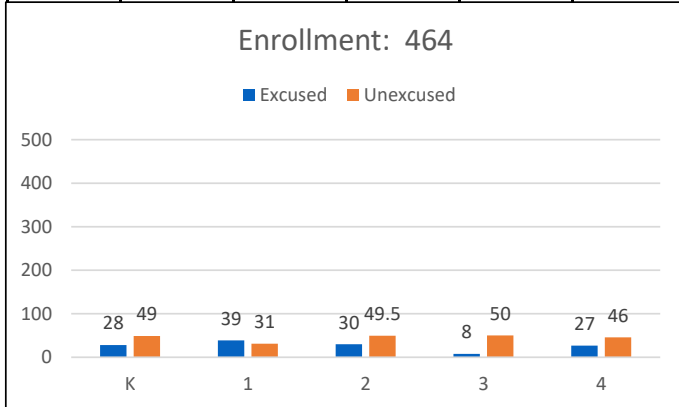
2019-20	RP1: 4%	RP2: 5%	RP3: 6%	RP4: 6.6%	RP5: 7.8%	RP6: 8.4%	RP7: 7.5%	Covid-19	Covid-19
2020-21	RP1: 6.1%	RP2: 7.1%	RP3: 7.3%	RP4: 11%	RP5: 11.7%	RP6: 8.9%	RP7: 6.9%	RP8: 7.5%	RP9: 6.4%
2021-22	RP1: 6.1%	RP2: 6%	RP3: 6.4%	RP4: 6.9%	RP5: 6.6%	RP6: 6.5%	RP7: 8%	RP8: 6.6%	RP9: 7.4%
2022-23	RP1: 3.6%	RP2: 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%	RP7: 6.2%	RP8: 4.3%	RP9: 6.3%

Willow Brook



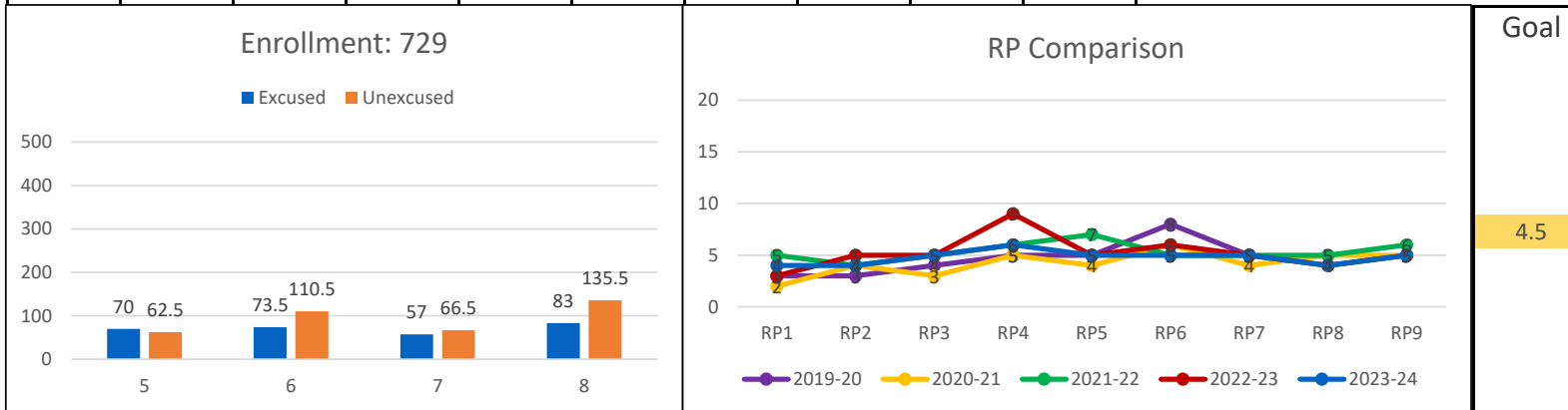
2019-20	RP1: 4%	RP2: 4%	RP3: 5%	RP4: 5.6%	RP5: 6.2%	RP6: 8.4%	RP7: 6.6%	Covid-19	Covid-19
2020-21	RP1: 4.1%	RP2: 4.9%	RP3: 6.2%	RP4: 7.1%	RP5: 7.1%	RP6: 5.9%	RP7: 5.5%	RP8: 5.9%	RP9: 5.3%
2021-22	RP1: 4.5%	RP2: 4.1%	RP3: 4.8%	RP4: 6.7%	RP5: 5.9%	RP6: 5%	RP7: 4.7%	RP8: 4.5%	RP9: 5.2%
2022-23	RP1: 2.6%	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%	RP7: 5.2%	RP8: 2.9%	RP9: 4.5%

Woodland



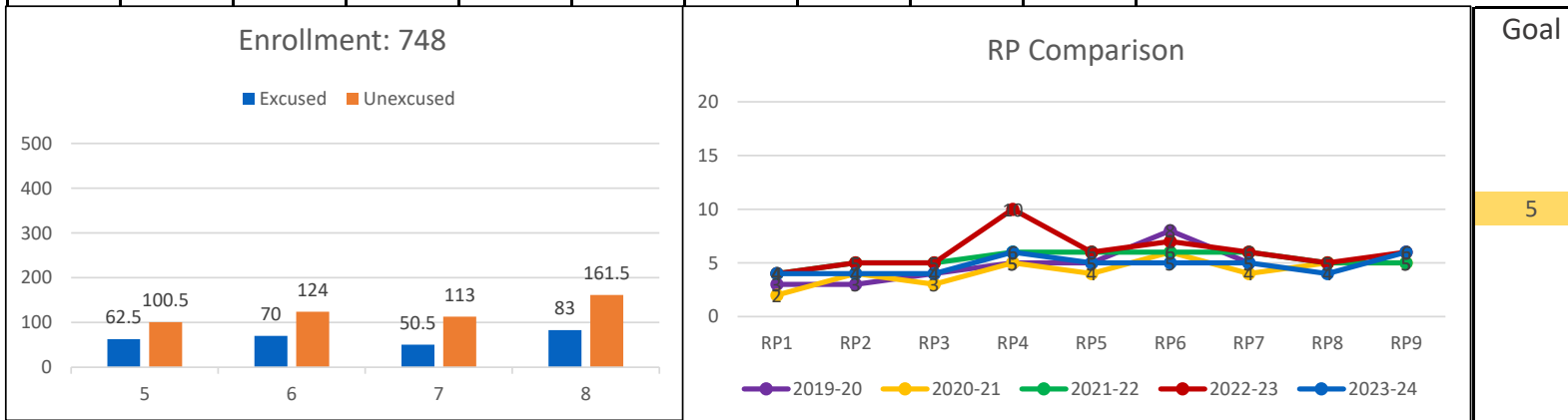
2019-20	RP1: 3%	RP2: 3%	RP3: 4%	RP4: 5%	RP5: 4.9%	RP6: 8.4%	RP7: 5.2%	Covid-19	Covid-19
2020-21	RP1: 2.2%	RP2: 4.1%	RP3: 3.4%	RP4: 4.5%	RP5: 3.8%	RP6: 5.7%	RP7: 3.7%	RP8: 5.1%	RP9: 4.7%
2021-22	RP1: 5.1%	RP2: 4.2%	RP3: 4.9%	RP4: 5.9%	RP5: 6.8%	RP6: 5.4%	RP7: 5.3%	RP8: 4.9%	RP9: 6.1%
2022-23	RP1: 3.1%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

Jefferson



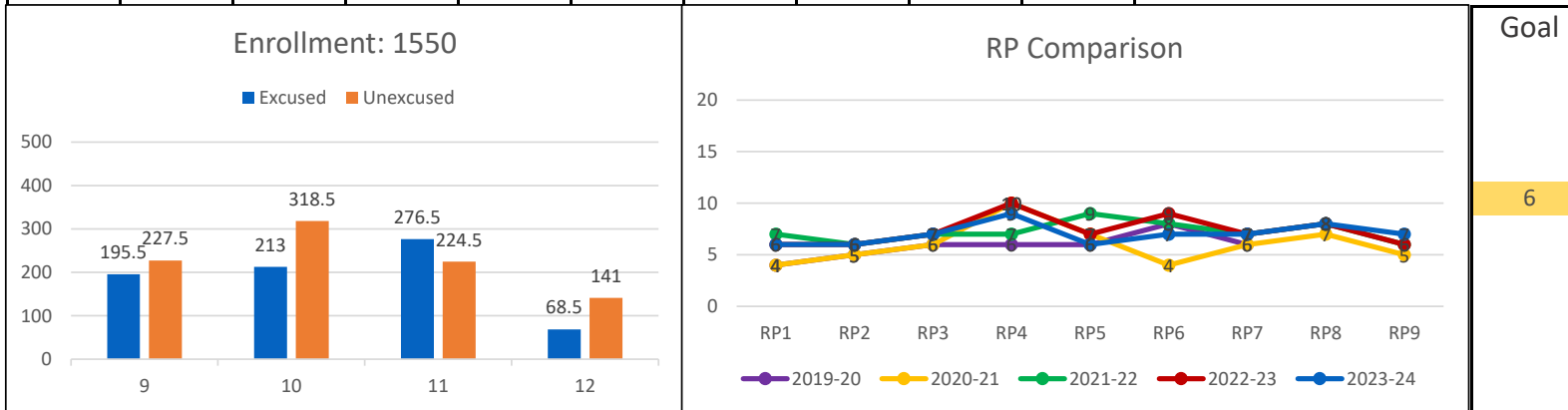
2019-20	RP1: 4%	RP2: 4%	RP3: 5%	RP4: 5.7%	RP5: 5.6%	RP6: 7.9%	RP7: 5.7%	Covid-19	Covid-19
2020-21	RP1: 2%	RP2: 2.3%	RP3: 3.4%	RP4: 4%	RP5: 2.7%	RP6: 3.3%	RP7: 2.8%	RP8: 5.6%	RP9: 5.1%
2021-22	RP1: 4.2%	RP2: 4.7%	RP3: 5.4%	RP4: 5.8%	RP5: 5.9%	RP6: 5.5%	RP7: 5.6%	RP8: 5%	RP9: 5.3%
2022-23	RP1: 4.4%	RP2: 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%	RP7: 5.1%	RP8: 4%	RP9: 6.2%

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%	RP7: 6.9%	RP8: 8.3%	RP9: 7.3%

ORHS



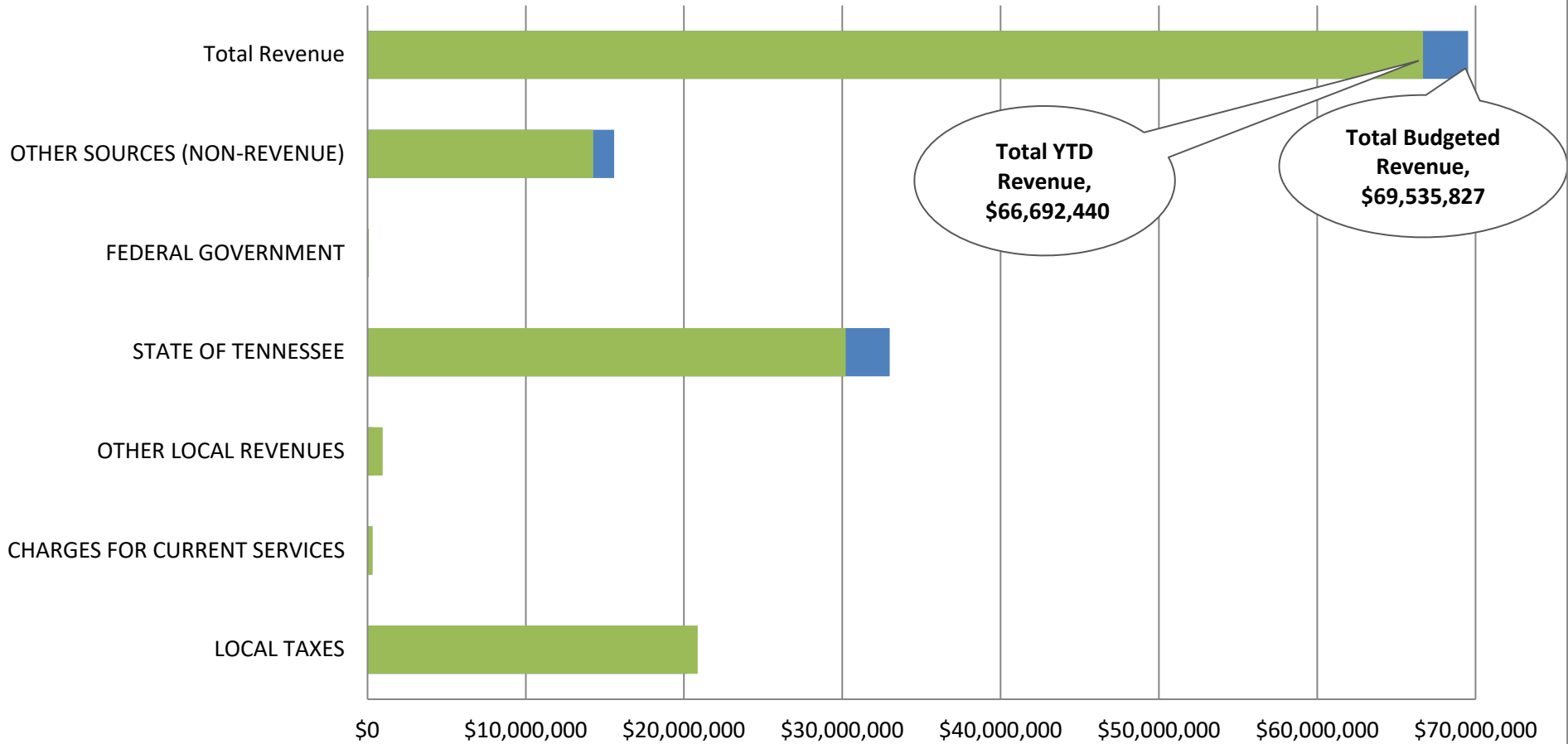
Acct	Acct	2023-24 FYTD Budget	May 2023-24 Monthly Activity	2023-24 Year-To-Date	2023-24 Percent of Budget	2023-24 Variance from Bud	Encumbered Amount	Unencumbered Budget Remaining
40110	Current Property Tax	12,993,941.00	79,172.23	12,889,091.53	99.19%	104,849.47		104,849.47
40210	Local Option Sales Tax	7,200,000.00	712,969.37	7,968,099.89	110.67%	-768,099.89		-768,099.89
40275	Mixed Drink Tax	125.00	21.48	354.69	283.75%	-229.69		-229.69
40280	Mineral Severance Tax	125.00				125.00		125.00
43511	Tuition - Regular Day Students	300,000.00	10,358.00	320,504.14	106.83%	-20,504.14		-20,504.14
43513	Tuition - Summer School			150.00		-150.00		-150.00
43533	Transportation Fees	3,000.00	1,220.00	3,930.00	131.00%	-930.00		-930.00
44110	Interest Earned	220,000.00	106,026.29	799,507.31	363.41%	-579,507.31		-579,507.31
44120	Lease/Rentals	10,000.00	3,412.50	18,640.00	186.40%	-8,640.00		-8,640.00
44170	Miscellaneous Refunds	3,000.00		16,319.85	544.00%	-13,319.85		-13,319.85
44530	Sale of Equipment	20,000.00	39.20	41,001.17	205.01%	-21,001.17		-21,001.17
44570	Contributions & Gifts	63,307.48		60,673.48	95.84%	2,634.00		2,634.00
44990	Other Local Revenues	62,000.00	261.00	29,898.13	48.22%	32,101.87		32,101.87
46510	TN Investment in Student Achv	30,250,000.00	136,211.66	28,288,732.22	93.52%	1,961,267.78		1,961,267.78
46515	Early Childhood Education	553,297.65	49,141.89	380,900.09	68.84%	172,397.56		172,397.56
46590	Other State Education Funds	603,788.67				603,788.67		603,788.67
46610	Career Ladder Program	84,600.00		85,843.05	101.47%	-1,243.05		-1,243.05
46790	Other Vocational	1,191,172.15	38,083.74	1,258,184.21	105.63%	-67,012.06		-67,012.06
46980	Other State Grants	258,573.91	9,623.17	130,715.97	50.55%	127,857.94		127,857.94
46990	Other State Revenues	45,189.00		70,364.20	155.71%	-25,175.20		-25,175.20
47630	Public Law 874 - Maint/Operat.			23,692.00		-23,692.00		-23,692.00
47640	ROTC Reimbursement	79,600.00	0.02	49,818.06	62.59%	29,781.94		29,781.94
49700	Insurance Recovery	47,430.00	2,187.20	43,109.20	90.89%	4,320.80		4,320.80
49800	Transfers In	52,713.92	10,000.00	10,111.24	19.18%	42,602.68		42,602.68
49810	City General Fund Transfer	15,493,963.00	1,291,163.58	14,202,799.38	91.67%	1,291,163.62		1,291,163.62
-----	Revenue	69,535,826.78	2,449,891.33	66,692,439.81	95.91%	2,843,386.97		2,843,386.97
		=====	=====	=====	=====	=====		=====
71100	Regular Instruction Prgm	31,040,956.50	2,599,835.66	25,426,514.28	81.91%	5,614,442.22	2,520,443.24	3,093,998.98
71150	Alternative Instruction Prgm	914,477.00	81,193.44	768,842.96	84.07%	145,634.04	77,507.24	68,126.80
71200	Special Education Prgm	5,393,176.88	459,653.87	4,447,929.76	82.47%	945,247.12	461,340.32	483,906.80
71300	Career/Technical Education Prg	2,725,198.15	187,638.65	2,239,105.03	82.16%	486,093.12	215,915.77	270,177.35
71900	Contingency	289,814.11				289,814.11		289,814.11
72120	Health Services	750,617.21	77,214.49	666,347.28	88.77%	84,269.93	62,656.10	21,613.83
72130	Other Student Support	2,234,539.21	234,991.65	1,763,448.83	78.92%	471,090.38	140,969.38	330,121.00
72210	Regular Inst. Support	4,156,865.42	362,680.85	3,472,045.98	83.53%	684,819.44	297,046.99	387,772.45
72220	Special Education Support	991,925.00	80,047.26	806,059.91	81.26%	185,865.09	126,846.48	59,018.61
72230	Career & Technical Prg Support	251,998.00	26,180.73	220,451.56	87.48%	31,546.44	25,088.46	6,457.98
72250	Technology Services	3,149,919.96	240,887.16	2,825,541.85	89.70%	324,378.11	249,733.59	74,644.52

Acct	Acct	2023-24 FYTD Budget	May 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
72260	Adult Programs	27,050.00	2,622.13	24,294.53	89.81%	2,755.47	2,622.05	133.42
72290	Communications	214,608.00	16,818.33	193,725.83	90.27%	20,882.17	20,000.53	881.64
72310	Board of Education	1,282,955.00	34,293.47	1,004,865.74	78.32%	278,089.26	1,006.94	277,082.32
72320	Director of Schools	404,045.00	30,962.89	356,540.01	88.24%	47,504.99	31,404.70	16,100.29
72410	Office of the Principal	4,489,268.86	376,872.11	4,009,992.89	89.32%	479,275.97	383,460.59	95,815.38
72510	Fiscal Services	1,033,785.00	85,571.16	924,712.13	89.45%	109,072.87	81,030.87	28,042.00
72520	Human Resources/ Personnel	479,316.00	33,613.49	427,777.82	89.25%	51,538.18	36,808.06	14,730.12
72610	Operation of Plant	4,878,033.92	379,372.42	4,165,694.73	85.40%	712,339.19	278,887.73	433,451.46
72620	Maintenance of Plant	2,531,653.76	209,218.16	2,138,292.62	84.46%	393,361.14	266,561.34	126,799.80
72710	Transportation	2,071,687.84	82,486.20	1,423,005.44	68.69%	648,682.40		648,682.40
73400	Early Childhood Education	455,414.20	39,103.27	381,679.20	83.81%	73,735.00	39,523.60	34,211.40
73401	Pre-K General Fund	849,630.00	73,043.21	728,279.55	85.72%	121,350.45	59,407.64	61,942.81
76100	Regular Capital Outlay	2,629,538.76	329,243.46	2,128,943.32	80.96%	500,595.44	438,824.78	61,770.66
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	73,375,944.78	6,043,544.06	60,551,091.25	82.52%	12,824,853.53	5,817,086.40	7,007,767.13
-----	General Purpose School Fund	-3,840,118.00	-3,593,652.73	6,141,348.56	89.04%	-9,981,466.56	-5,817,086.40	-4,164,380.16
	Grand Revenue Totals	69,535,826.78	2,449,891.33	66,692,439.81	95.91%	2,843,386.97		2,843,386.97
	Grand Expense Totals	73,375,944.78	6,043,544.06	60,551,091.25	82.52%	12,824,853.53	5,817,086.40	7,007,767.13
	Grand Totals	3,840,118.00	3,593,652.73	6,141,348.56	-159.93%	9,981,466.56	5,817,086.40	4,164,380.16
		Loss	Loss	Profit		Loss	Loss	Loss

Number of Accounts: 1388

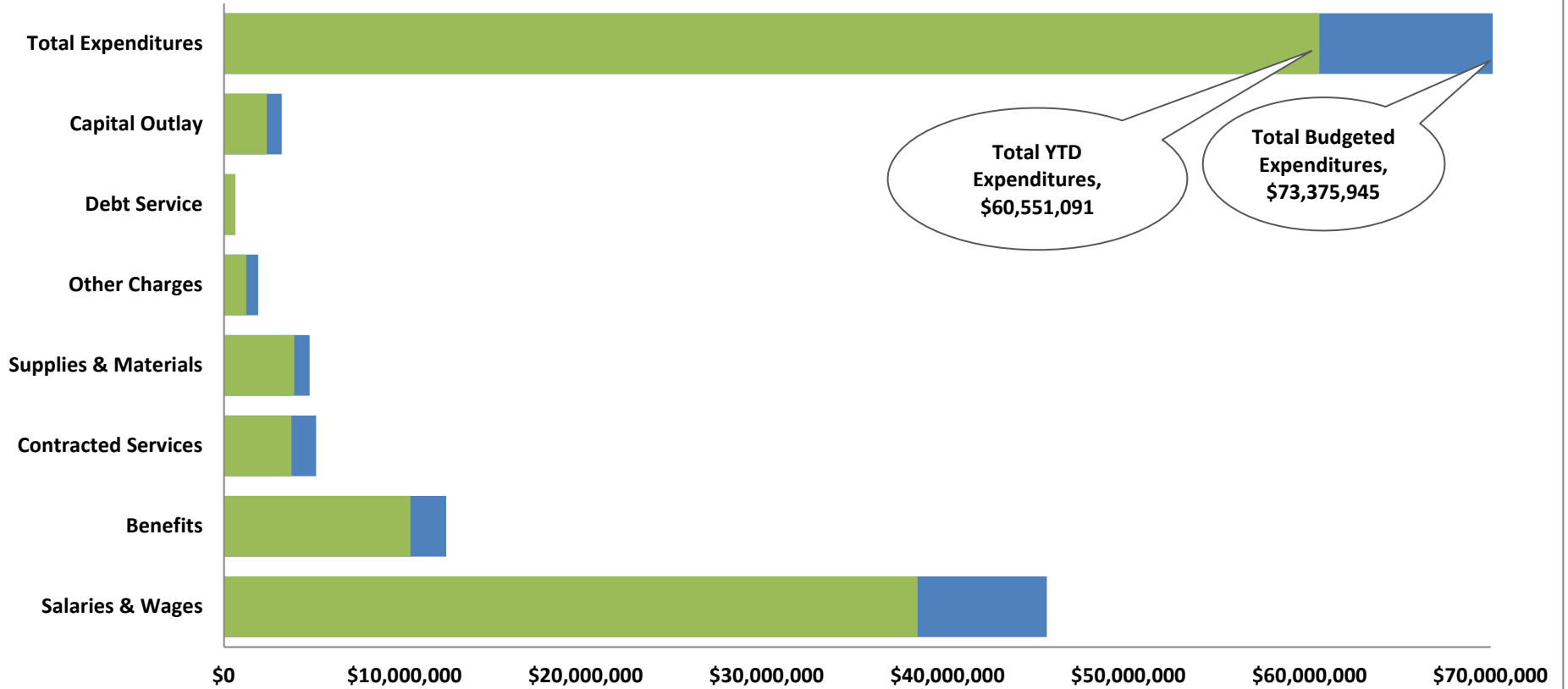
***** End of report *****

General Fund Revenue Budget to Actual Summary - May, 2024



	LOCAL TAXES	CHARGES FOR CURRENT SERVICES	OTHER LOCAL REVENUES	STATE OF TENNESSEE	FEDERAL GOVERNMENT	OTHER SOURCES (NON-REVENUE)	Total Revenue
■ Percent of Budget	103.28%	107.12%	255.36%	91.60%	92.35%	91.42%	95.91%
■ Year-To-Date	20,857,546.11	324,584.14	966,039.94	30,214,739.74	73,510.06	14,256,019.82	\$66,692,440
■ FYTD Budget	20,194,191.00	303,000.00	378,307.48	32,986,621.38	79,600.00	15,594,106.92	\$69,535,827

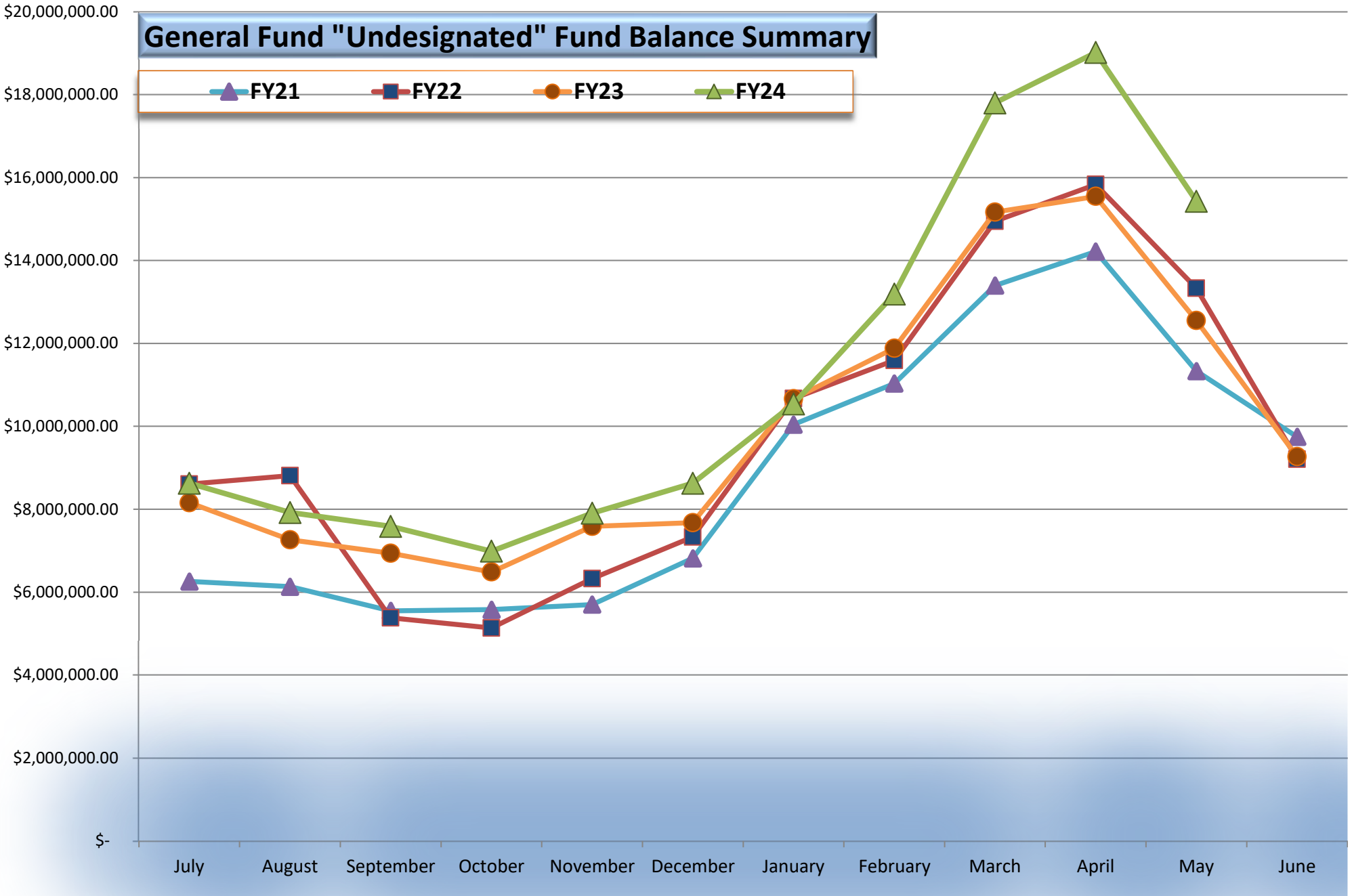
General Fund Expenditure Budget to Actual Summary by Object May, 2024



	Salaries & Wages	Benefits	Contracted Services	Supplies & Materials	Other Charges	Debt Service	Capital Outlay	Total Expenditures
FYTD %	84.29%	83.91%	73.42%	82.18%	64.99%	100%	74.19%	82.52%
FYTD Activity	38,338,411.87	10,312,841.47	3,742,579.62	3,897,856.39	1,235,942.70	644,205.00	2,379,254.20	\$60,551,091
FYTD Revised Bdg	45,485,120.90	12,293,788.36	5,097,813.24	4,743,250.39	1,905,453.99	644,205.00	3,206,312.90	\$73,375,945

General Fund "Undesignated" Fund Balance Summary

FY21 FY22 FY23 FY24



Acct	Acct	2023-24 FYTD Budget	May 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	6,548.15	63,623.64	84.49%	11,675.90		11,675.90
47141	Title I	951,633.72	98,692.30	697,822.57	73.33%	253,811.15		253,811.15
47143	Special Education Grants	1,560,073.40	98,403.55	949,584.21	60.87%	610,489.19		610,489.19
47145	Special Ed Pre-School Grants	49,724.63	2,844.08	17,767.55	35.73%	31,957.08		31,957.08
47146	English Lang Acq Grants	32,739.63		16,577.09	50.63%	16,162.54		16,162.54
47147	Title IV Part B, 21st Century	152,625.00	8,733.18	86,109.83	56.42%	66,515.17		66,515.17
47189	Title II	202,985.86	2,453.69	91,615.90	45.13%	111,369.96		111,369.96
47307	COVID-19 Grant B	73,250.00		13,000.00	17.75%	60,250.00		60,250.00
47309	COVID-19 Grant D	123,000.00	29,515.93	73,912.19	60.09%	49,087.81		49,087.81
47310	COVID-19 Grant E	14,883.63		14,883.63	100.00%			
47401	ESSER 3.0	2,198,231.35	329,905.73	1,845,661.34	83.96%	352,570.01		352,570.01
47404	ARP Homeless Grant	45,518.53	1,900.00	11,474.69	25.21%	34,043.84		34,043.84
47590	Other Federal Through State	514,261.76	18,100.72	302,029.52	58.73%	212,232.24		212,232.24
47710	Public Safety Prtnrshp & Comm	373,217.00		373,217.00	100.00%			
47990	Other Direct Fedral Revenue	1,181,154.79	80,819.29	819,982.91	69.42%	361,171.88		361,171.88
-----	Revenue	7,548,598.84	677,916.62	5,377,262.07	71.24%	2,171,336.77		2,171,336.77
E	Expense							
71100	Regular Instruction Prgm	1,479,700.25	72,563.82	1,340,164.24	90.57%	139,536.01	87,349.25	52,186.76
71200	Special Education Prgm	1,223,751.95	83,714.39	835,491.35	68.27%	388,260.60	109,693.55	278,567.05
71300	Career/Technical Education Prg	67,314.82	5,012.76	64,765.31	96.21%	2,549.51	2,504.64	44.87
72120	Health Services	39,135.69		19,063.94	48.71%	20,071.75	114.11	19,957.64
72130	Other Student Support	1,405,519.19	56,299.72	1,039,808.53	73.98%	365,710.66	157,136.54	208,574.12
72210	Regular Inst. Support	1,012,655.16	26,265.19	741,485.69	73.22%	271,169.47	35,506.15	235,663.32
72220	Special Education Support	360,992.70	28,412.97	303,306.21	84.02%	57,686.49	28,517.26	29,169.23
72230	Career & Technical Prg Support	1,642.55		1,642.55	100.00%			
72250	Technology Services	18,000.00	120.00	10,911.58	60.62%	7,088.42		7,088.42
72710	Transportation	19,382.23	1,026.18	15,107.65	77.95%	4,274.58		4,274.58
73100	Food Service	1,000.00	675.00	825.00	82.50%	175.00	1,000.00	-825.00
73300	Community Services	1,324,807.01	133,224.43	1,056,109.21	79.72%	268,697.80	98,194.28	170,503.52
76100	Regular Capital Outlay	373,217.00		373,217.00	100.00%			
99100	Transfers Out	221,480.29		111.24	0.05%	221,369.05		221,369.05
-----	Expense	7,548,598.84	407,314.46	5,802,009.50	76.86%	1,746,589.34	520,015.78	1,226,573.56

Acct	Acct	2023-24 FYTD Budget	May 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	742.50	19,545.25	55.84%	15,454.75		15,454.75
49800	Transfers In	120,021.00				120,021.00		120,021.00
-----	Revenue	155,021.00	742.50	19,545.25	12.61%	135,475.75		135,475.75
E	Expense							
73300	Community Services	155,021.00	13,158.86	127,413.70	82.19%	27,607.30	3.91	27,603.39
-----	Expense	155,021.00	13,158.86	127,413.70	82.19%	27,607.30	3.91	27,603.39
-----	Other Education Funds		-12,416.36	-107,868.45	47.40%	107,868.45	-3.91	107,872.36
=====								
146	Extended School Program							
R	Revenue							
43581	Community Services Fees Child	446,100.00	42,406.85	494,259.66	110.80%	-48,159.66		-48,159.66
-----	Revenue	446,100.00	42,406.85	494,259.66	110.80%	-48,159.66		-48,159.66
E	Expense							
73300	Community Services	438,337.00	38,805.99	357,762.76	81.62%	80,574.24	44,670.81	35,903.43
99100	Transfers Out	10,000.00	10,000.00	10,000.00	100.00%			
-----	Expense	448,337.00	48,805.99	367,762.76	82.03%	80,574.24	44,670.81	35,903.43
-----	Extended School Program	-2,237.00	-6,399.14	126,496.90	96.38%	-128,733.90	-44,670.81	-84,063.09
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<u>Acct</u>	<u>Acct</u>	<u>2023-24</u>	<u>May 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		10,654,013.84	943,941.55	8,051,647.56	75.57%	2,602,366.28		2,602,366.28
Grand Expense Totals		11,156,250.84	728,318.08	8,582,120.75	76.93%	2,574,130.09	642,983.35	1,931,146.74
Grand Totals		502,237.00	215,623.47	530,473.19	105.62%	28,236.19	642,983.35	671,219.54
		Loss	Profit	Loss		Profit	Loss	Profit

Number of Accounts: 424

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

Combined Fund Balance and YTD Operating Statement Summary

May, 2024

Description	General Fund 141	Federal Fund 142	Food Service Fund 143	Special Fund 145	ECC Fund 146
Beginning Fund Balance July 1, 2023	16,158,657.76	0.00	2,070,826.26	29,790.62	223,533.17
Plus YTD Revenue per books 5/31/24	66,692,439.81	5,377,262.07	2,160,580.58	19,545.25	494,259.66
Less YTD Expenditures per books 5/31/24	(60,551,091.25)	(5,802,009.50)	(2,284,934.79)	(127,413.70)	(367,762.76)
Revenues Over (Under) Expenditures as of 5/31/24	6,141,348.56	(424,747.43)	(124,354.21)	(107,868.45)	126,496.90
Ending Fund Balance per books as of 5/31/24	22,300,006.32	(424,747.43)	1,946,472.05	(78,077.83)	350,030.07

Fund Balance Restricted/Committed/Assigned Status

Encumbrances and Deferred Revenue	\$ 5,055.00		\$ 56,209.87		
Inventory					
Restricted for Career Ladder Program	-942.34				
Restricted for Operation of Non-Instructional Services (CCI)	16,200.00		1,390,262.18		350,030.07
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	1,615.59				
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)				-78,077.83	
Nonspendable-Prepaid Expenditures					
Assigned to Balance FY24 Budget	3,840,118.00	0.00	500,000.00		
Unassigned Fund Balance 5/31/24	\$ 15,425,686.93	-424,747.43	0.00	0.00	
Total Fund Balance 5/31/24	\$ 22,300,006.32	\$ (424,747.43)	\$ 1,946,472.05	(\$78,077.83)	\$ 350,030.07