

# Regular Board of Education Meeting

March 24, 2025 5:00 PM

Robert J. Smallridge School Administration Building

## I. Call to Order

## II. Pledge of Allegiance and Presentation of Colors

## III. School Program by Jefferson Middle School

## IV. Approval of Agenda

## V. Special Reports/Presentations

A. Good News

B. OREA Salary Proposal

C. Principal's Salary Proposal

## VI. Public Forum

## VII. Consent Agenda

A. Board Minutes 02-24-25

B. ORHS Band and Orchestra Field Trip to Nashville, TN

C. ORHS Boys Soccer Field Trip to Gatlinburg, TN

D. ORHS Girls Basketball Field Trip to Murfreesboro, TN

E. ORHS Boys Basketball Field Trip to Murfreesboro, TN

F. ORHS Cheerleaders Field Trip to Murfreesboro, TN

## VIII. Items for Action

A. FY25 Budget Transfer #2 & Budget Amendment #1 - Second Reading

B. FY25 Tenure Status for Eligible Staff Member

C. FY26 Preschool Head Start Baseline Grant

D. FY26 Preschool Head Start Training and Technical Assistance Plan (T/TA Plan)

E. FY26 Non-Resident Tuition Rates

F. Selection of Oak Ridge Schools Volunteer of the Year

G. FY26 ORHS Oak Log Contract

H. Purchase of Student Laptops - Grades 5-12

I. Purchase of Student Laptop Bags - Grades 5-12

J. Robertsville Middle School New Club Rams Cube Club

## IX. Items for Information

A. Legislative Update

B. Financial Report

C. Enrollment & Attendance

## X. Items for Discussion

## XI. Old Business

## XII. New Business

## XIII. Communications

## XIV. Adjournment



## **Oak Ridge Preschool**

The Preschool held a “Fathers and Friends” event on March 4. We had a great turnout, and the families all left with smiles on their faces. A huge thank you to the Oak Ridge Wildbots for joining us and allowing our students to enjoy the hands-on activities with the robots, as well as watching the 3-D printer in action.

Thank you to the Friends of Literacy for their generous donation of books for our preschoolers. Each student selected two books to take home, and they were so excited to choose their own books!

## **Glenwood**

Christine and Steve Marshall, authors and illustrators of the *Noblestone* book series, visited Glenwood 3rd graders during the week of March 3rd to celebrate their completion of *Peter Pan*. Students learned from the authors through a presentation and completed a mini art and writing lesson. These local writers continue the adventures of Peter Pan and friends in their exciting book series. It was a wonderful experience to reinforce our EL curriculum and make a career connection!

Glenwood celebrated the arts on March 6! Student artwork was on display for their families, Kindergarten performed “E-I-E-I-Oops,” and our Cubotics Lego robotics team put on an exhibition for Glenwood families. A great time was had by all!

## **Willow Brook**

On the afternoon of February 26, the Willow Brook and Linden staff came together for a collaborative professional learning session. It was a productive time as both teams discussed current lessons, focusing on what engagement looks like and how technology can be integrated to enhance learning. A special thank you to both PLC coaches Kim Miller and Kimberly Brasel, as well as Innovation Coach Dr. Tiffany Collins, for leading the PD. We truly value the opportunity to collaborate and learn together.

During the week of March 3rd, Willow Brook students took part in Read Across America. This exciting event saw our students read over 3,365 pages—the equivalent of a coast-to-coast journey—as part of a challenge issued by Ms. Meidl. In celebration of their success, Mr. Nussbaum had the honor of dressing up as Dr. Seuss' Cat in the Hat on Friday to recognize the incredible achievement of the program.

What's better than dressing up as the Cat in the Hat? How about having the Cat in the Hat host an assembly for students and parents to celebrate our second-semester Kid of Promise award winners! During the Friday morning assembly, students who demonstrated perseverance and empathy were honored. Award winners received a special lanyard, a certificate, and coupons in recognition of their achievements.



## **Woodland**

Congratulations to our Woodland Chess Team, which competed against schools from across East Tennessee in the Regional Scholastic Team Tournament. These six students placed 4th in the region and qualified for state. Congratulations and great job to the following members: Misra Acarsar, SJ Buckner, Tommy Driskill, Silas Large, Colton McDaniel, and Iris Ownby.

Special thanks to Ms. Large for being the game-day coach of our Hawk Chess Team in their first tournament! Your fellow chess team members and Woodland School are proud of you!

## **Jefferson**

Thanks to a literacy grant from Altrusa and the Oak Ridge Breakfast Rotary Club, French students at JMS now have materials to create durable storybooks to add to their classroom library. Eighth-grade students will write, edit, and illustrate stories using comprehensible language. These high-interest books will give future students more choices during their silent reading period.

For the first time since 2020, the Jefferson Middle School Chess Team has qualified to play in the State Team Tournament, which will be held on Saturday, March 29, at Tennessee Tech in Cookeville, TN. Congratulations to the following team members: Audrey Large, Logan Farrar, Niko Marquez, Preston Atkinson, and veteran player Finnley Mindrup. The JMS Chess Coaches are Ms. Kala, Mr. Hondorf, and Mr. Chan.

On Wednesday, March 5, the Jefferson Middle School 7th and 8th grade bands performed at the ETSBOA Concert Performance Assessment at Farragut High School in Knoxville. This assessment consisted of two parts: a prepared stage performance and a performance of a piece of music the students have never seen before. Both performances were judged by a panel of seasoned music educators. The band earned superior ratings from every judge in both parts of the assessment, which is the highest award given at this event. This is a very prestigious honor and the culmination of our students' years of hard work with the Jefferson Middle School Band. Congratulations to our band students on this wonderful accomplishment!



## **Robertsville**

Congratulations to Ms. Abby Douglas (5th ELA) and Mrs. Kathy Douglas (6th ELA), who were awarded a classroom grant from the 2025 Literacy Grant Program through Altrusa International of Oak Ridge, Tennessee, Inc. and the Oak Ridge Breakfast Rotary Club. The grant allowed the purchase of ten (five per classroom) C-Pen Lingo 3 translation scanner pens. This tool will make learning more accessible to our English Language Learners and students with learning disabilities. The goal of the purchase was to make learning more accessible to all students.

RMS students Eilidh (I-Lee) Renegar, Edward Cassidy, Makoy King, and Kaylee Black recently competed in the first round of the National Civics Bee, which required the students to write an essay. The students were notified that they made it to the next round of the competition, which will take place on March 25. Congratulations on this great accomplishment, and good luck in the next round!

## **Oak Ridge High School**

Brandon Bonamarte placed second at the Tennessee Junior Science and Humanities Symposium last month. His research project, titled "Identifying Key Factors to Improve Autism Spectrum Disorder Diagnosis with Machine Learning," aims to minimize the amount of data needed to correctly classify a patient as autistic or not. Brandon will compete at the National JSHS in late April.

Mason Greenhalgh will compete at the 2025 Nike Indoor Nationals on March 16. He is entered into the Championship Race (highest level) of the Boys 800 Meter Run. His goal is not only to win the event overall but also to set a new school record.

Senior Andrew Chou won the 100 Fly at the TISCA State Swim Meet on Friday, February 7, becoming the first ORHS state champion that anyone can remember. He placed second in the 100 Back the next evening. He was named All-American in both events and set new school records.

The Sylvia Brinkman Foundation, named in honor of the longtime ORHS Track and Field Coach, has received its 501(c)(3) status approval from the IRS, held its first board meeting, and is now fully operational. This foundation will benefit the ORHS Track and Cross Country programs in perpetuity.

**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: 02/14/2025

*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 BAND/ORCHESTRA-SELECTED STUDENTS

Educational Activity: TMEA ALL STATE MUSIC CONFERENCE

Destination: NASHVILLE, TN

Purpose of Trip: STUDENTS WILL PARTICIPATE IN HONORS CLINIC BANDS & DIREC

Departure Date: 04/10/2025 Departure Time: 8:00 AM

Return Date: 04/13/2025 Return Time: 5:00 PM

Mode of Transportation: VAN/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: \_\_\_\_\_

Driver's License Verified by: \_\_\_\_\_ Attach copy of driver's license

Transportation Contractor: SEXTON AUTOMOTIVES (VANS) Phone #: (865) 272-3223

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

Air Travel Flight #'s: \_\_\_\_\_

Hotel/Motel Name: GAYLORD OPRYLAND

Address: 2800 OPRYLAND DRIVE

City: NASHVILLE State: TN Zip: 37214

Phone: (615) 889-1000 Contact Person: \_\_\_\_\_

Number of Nights: 3 Hotel Rating: 4

Name of School Sponsor/Date: CARLOS HERNANDEZ-BAEZ

Signature of School Sponsor: \_\_\_\_\_ Cell #: (787) 367-5823

*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: 9

# of Adults: 2

Chaperone/Student Ratio: \_\_\_\_\_

**Professional Staff Chaperone(s)**

1. Name: CARLOS HERNANDEZ-BAEZ Cell #: (787) 367-5823

2. Name: MICHAEL SPIRKO Cell #: (865) 323-3228

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, involve out of the country travel, out of state travel or overnight stay 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
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Substitute Required      Acct to be charged for Substitute \_\_\_\_\_

\$ 150.00 Per Student      TOTAL TRIP AMOUNT: \$ ~3,000

Provisions for those students unable to pay: \_\_\_\_\_

**THIS IS A VOLUNTARY PARTICIPATION EVENT OUTSIDE OF CLASS CURRICULUM WITH REQUIRED FEES.**

**BOOSTER ORGANIZATIONS MAY HELP OFFSET FEES.**

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

TMEA SETS THE REGISTRATION FEE AND VENUE FOR EVENT. STUDENTS WILL HAVE ALREADY

**PARTICIPATED IN THE VOLUNTARY ETSBOA ALL EAST CLINIC AS WELL.**

Staff Member: \_\_\_\_\_

Date: 02/14/2025

Athletic Director: \_\_\_\_\_

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

**This Section for Athletic Trips Only**

At the high school level up to three events and/or tournaments per season can involve an overnight trip. However, no more than one day of school may be missed for these trips. (Under certain conditions, the Superintendent of Schools or designee may approve additional events.? These trips must be paid entirely from funds outside the Oak Ridge High School Athletic Department. TSSAA Tournament games would be an exception to this policy. (All overnight trips involving middle school athletics require Superintendent or designee approval.)

Number of overnight trips (including this request) requested during the current school year: \_\_\_\_\_

Athletic Director Signature: \_\_\_\_\_

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

Principal's Action: Approved: Disapproved:

Principal's Signature: [Signature]

Date: 2.17.25

Superintendent or Designee's Action: Approved: Disapproved:

Superintendent or Designee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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



# Oak Ridge Schools – Campus Leave/Field Trip Permission Form

Name of Group: ORHS ORCHESTRA/BAND

Destination: NASHVILLE, TN

Mode of Transportation: VANS/PARENTS Purpose: TMEA ALL STATE MUSIC CONFERENCE

Date: 04 / 10 / 25 Time: 8:00 AM to Date: 04 / 13 / 25 Time: 5:00 PM

Expected Number of Participants: 9 Expected Number of Chaperones: ~3

Teacher/Sponsor of Trip: CARLOS HERNANDEZ

Principal Signature: [Signature] Date: 2.17.25

Fee Requested (if any)\* \$150.00

\*In the course of learning throughout the school year, there are always opportunities to go above and beyond what the basic curriculum requires. In such cases, it is customary for the school to request a fee in order to cover the cost of these enhancements. These fees are in no way required and your child will not be denied the opportunity to participate or benefit from any curricular offering as a result of not paying a requested fee. The fees simply allow the district to offset the cost of any additional opportunities.

PARENT: Please separate this form and return to : \_\_\_\_\_ by: \_\_\_\_\_  
 (Teacher) (Date)

My child \_\_\_\_\_ has my permission to go on the Oak Ridge Schools field trip as described above. He/She will abide by the rules of Oak Ridge School and any special rules of the sponsor.

I have read and understand the activities my child will be involved with on this field trip. I understand that the Oak Ridge School System will provide adequate supervision, but as with any activity, injuries may occur. The School System is responsible only for injuries that result from the negligence of their staff. With my signature, I also authorize emergency medical treatment for my child.

I will be responsible for the damage to personal property of others or injury to other people caused by my son/daughter.

\_\_\_\_\_  
 Parent/Guardian (printed)

\_\_\_\_\_  
 Parent/Guardian (signature) Date \_\_\_\_\_

Please provide 2 Emergency Contact Phone Numbers

_____ Name/Relationship	_____ Number
_____ Name/Relationship	_____ Number

Whova registration

# Thank you for registering using Whova

A copy of your registration information to 66th Annual TMEA Music Education Conference has been sent to [mjspirko@ortn.edu](mailto:mjspirko@ortn.edu).

## Event Details

### 66th Annual TMEA Music Education Conference



April 9 - 13, 2025

2800 Opryland Dr  
[2800 Opryland Dr, Nashville, TN, 37214, US](https://www.google.com/maps/place/2800+Opryland+Dr,+Nashville,+TN,+37214,+US)



Contact information  
[jennifer.rothschild@conferencedirect.com](mailto:jennifer.rothschild@conferencedirect.com)

## Order Summary

Name: Michael Spirko  
Email: [mjspirko@ortn.edu](mailto:mjspirko@ortn.edu)  
Order Confirmation: ab76fddd7ab20939a495ed7c98a61f18  
Order Date: February 13, 2025 02:04 PM

Whova registration

# Thank you for registering using Whova

A copy of your registration information to 66th Annual TMEA Music Education Conference has been sent to [mjspirko@ortn.edu](mailto:mjspirko@ortn.edu).

## Event Details

### 66th Annual TMEA Music Education Conference



April 9 - 13, 2025

2800 Opryland Dr  
2800 Opryland Dr, Nashville, TN, 37214, US



## Contact information

[jennifer.rothschild@conferencedirect.com](mailto:jennifer.rothschild@conferencedirect.com)

## Order Summary

Name: Michael Spirko

Email: [mjspirko@ortn.edu](mailto:mjspirko@ortn.edu)

Order Confirmation: ced86f1b536149b591ce1f03d5367a63

Order Date: February 13, 2025 12:51 PM

**DRAFT ALL STATE ITINERARY**

April 10<sup>th</sup> @ 8:00 AM: DEPART ORHS

April 11<sup>th</sup>-12<sup>th</sup>: STAY @ OPRYLAND HOTEL FOR CONFERENCE & PERFORMANCES

April 13<sup>th</sup>: DEPART NASHVILLE & RETURN TO ORHS

**OAK RIDGE SCHOOLS**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

Accommodations: Overnight lodging for students must be appropriately selected with student safety, quality of accommodations, cost, and location to events as central considerations. Students should be appropriately assigned to rooms and an overnight adult supervision and contact plan should be established and communicated to students.

School: Oak Ridge High School Date: 2/28/2024

*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: Boys soccer

Educational Activity: Soccer Tournament in Gatlinburg

Destination: Rocky Top Sports World

Purpose of Trip: Tournament

Departure Date: 3/20 Departure Time: 2:00 pm

Return Date: 3/22 Return Time: 2:00pm

Mode of Transportation: BUS-PARKER

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: First Student Phone #: 865-425-3191

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

Air Travel Flight #'s: \_\_\_\_\_

Hotel/Motel Name: Embassy Suites by Hilton Gatlinburg Resort

Address: 604 Airport Road

City: Gatlinburg State: TN Zip: 37738

Phone: 865-436-2095 Contact Person: \_\_\_\_\_

Number of Nights: 2 Hotel Rating: \_\_\_\_\_

Name of School Sponsor/Date: Tom Gorman

Signature of School Sponsor: Thomas (TQA) Gorman Digitally signed by Thomas (TQA) Gorman Date: 2025.01.30 13:14:35 -05'00' Cell #: 865-806-2358

*Minimum requires teacher to student ratio:*

*PreK – 3 yr olds 1:4      K-2<sup>nd</sup> 1:6      3<sup>rd</sup>-4<sup>th</sup> 1:10      5<sup>th</sup>-8<sup>th</sup> 1:12      9<sup>th</sup>-12<sup>th</sup> 1:15*  
*4 yr olds 1:6*

Staff Member: See page 1

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 Galla

Date: 2/28/25

Principal's Action: Approved: Disapproved:

Principal's Signature: [Signature]

Date: 2/28/25

Superintendent or Designee's Action: Approved: Disapproved:

Superintendent or Designee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

# of Students: 41 # of Adults: 4 Chaperone/Student Ratio: 1:10

Professional Staff Chaperone(s)

- 1. Name: Andy Burr Cell #: 757-207-2877
- 2. Name: Tom Gorman Cell #: 865-806-2358
- 3. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

Other Chaperone(s):

- 1. Name: Allison Morgan Cell #: 865-253-2766
- 2. Name: Carmen Jackson Cell #: 865-574-7484
- 3. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

Field Trips which exceed \$25,000, involve out of the country travel, out of state travel or overnight stay 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	<u>Boys Soccer SSO</u>	
\$ <u>225</u> Per Student	TOTAL TRIP AMOUNT: \$ <u>9450</u>		

Provisions for those students unable to pay: Banner Sales Fundraiser covers the cost.

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

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## Oak Ridge Boys Soccer

### Gallatin Itinerary

3/20/2025

1:30 pm – Meet in Locker room

2:00 pm – Depart ORHS

4:00 pm – Check in to hotel

4:45 pm – Depart for Rocky Top Sports World

6/8 pm – Matches

9:45pm – Return to Hotel

11:00pm – Room Check/Lights out

3/21/2025

8:00 am - Meet for breakfast

10:00 am – Load Bus and depart for Rocky Top Sports World

11:20/1:10 pm – JV and Varsity Matches

3:00 pm – Depart for Hotel

6:00 pm – Team Dinner

10:00 pm – Room Check/Lights out

3/22/2025

7:30 am – Check out and depart for Rocky Top Sports World

9/10:50 – JV and Varsity Matches

1:00 pm – Depart for ORHS

2:30 pm – Arrive at ORHS

**OAK RIDGE SCHOOLS**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

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School: ORHS Date: 3/10/25

*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 Girls Basketball

Educational Activity: Competing

Destination: Murfreesboro, TN

Purpose of Trip: Participation in Basketball State Tournament

Departure Date: 03/11/25 Departure Time: 4:00 pm

Return Date: 3/15/25 Return Time: 2:00 p.m.

Mode of Transportation: Coach

First Student  Transportation Contractor  School System Van  Air Travel

NOTE: Only ORS employees are authorized to drive school system vans.

School System Van – Name of Driver: Paige Taylor / Kristina Sims / Makia Dowdell

Driver's License Verified by: \_\_\_\_\_ Attach copy of driver's license

Transportation Contractor: Rocky Top Premier Phone #: 865-429-8687

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

Air Travel Flight #'s: \_\_\_\_\_

Hotel/Motel Name: Hampton Inn

Address: 325 North Thompson Lane

City: Murfreesboro State: TN Zip: 37129

Phone: 615-690-2424 Contact Person: Jake Williams

Number of Nights: 4 Hotel Rating: 4.3

Name of School Sponsor/Date: Paige Taylor 3/10/25

Signature of School Sponsor: Paige Taylor Digitally signed by Paige Taylor  
Date: 2025.03.10 11:30:32 -04'00' Cell #: \_\_\_\_\_

*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: 11

# of Adults: 3

Chaperone/Student Ratio: 1:4

Professional Staff Chaperone(s)

- 1. Name: Paige Taylor Cell #: 423-715-6943
- 2. Name: Kristina Sims Cell #: 865-621-9395
- 3. Name: Mykia Dowdell Cell #: 865-360-7890
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

Other Chaperone(s):

- 1. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 2. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 3. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

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  - 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

+ Boosters + Outside Donations

Substitute Required Acct to be charged for Substitute \_\_\_\_\_

\$ 0.00 Per Student TOTAL TRIP AMOUNT: \$ 13,000.00

Provisions for those students unable to pay: \_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_

Staff Member: \_\_\_\_\_

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

Athletic Director: Joe Gaddis

Date: 3/10/25

This Section for Athletic Trips Only

At the high school level up to three events and/or tournaments per season can involve an overnight trip. However, no more than one day of school may be missed for these trips. (Under certain conditions, the Superintendent of Schools or designee may approve additional events.? These trips must be paid entirely from funds outside the Oak Ridge High School Athletic Department. TSSAA Tournament games would be an exception to this policy. (All overnight trips involving middle school athletics require Superintendent or designee approval.)

Number of overnight trips (including this request) requested during the current school year: \_\_\_\_\_

Athletic Director Signature: Joe Gaddis

Date: 3/10/25

Principal's Action: Approved: Disapproved:

Principal's Signature: Bill Gotsch

Date: 3/10/25

Superintendent or Designee's Action: Approved: Disapproved:

Superintendent or Designee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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

## **Itinerary for March 11 – 15, 2025 – Oak Ridge Girls Basketball Team – Varsity**

### **March 11th**

5:00 pm est – Leave for Murfreesboro

6:30 pm cst – Arrive at Hotel

7:30 pm - Eat Dinner as a team

9:30 pm – Back to Hotel

### **March 12th**

8:30 am – Breakfast at Hotel

10:00 am – 12:00 pm – Practice at Oakland High School

12:30 pm – Team Lunch

1:30 pm – Back to Hotel

2:00 pm – 6:00 pm - TBD

6:00 pm – Team Dinner

8:30 pm – Back to Hotel

### **March 13th**

9:00 am – Breakfast at Hotel

10:00 am – 11:00 pm – Shoot Around at Oakland High School

11:30 am – Team Lunch

12:30 pm – Back to Hotel

1:30 pm – Depart Hotel for Game

4:00 pm – 1<sup>st</sup> Round game vs Bartlett

TBD – Team Dinner

TBD – Back to Hotel

### **March 14<sup>th</sup> and 15<sup>th</sup>**

All with be determined after our game on Thursday.

**OAK RIDGE SCHOOLS**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

*Accommodations: Overnight lodging for students must be appropriately selected with student safety, quality of accommodations, cost, and location to events as central considerations. Students should be appropriately assigned to rooms and an overnight adult supervision and contact plan should be established and communicated to students.*

School: ORHS Date: 3/11/25

*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: Competition

Destination: Murfreesboro, TN

Purpose of Trip: Participation in Basketball State Tournament

Departure Date: 3/18/25 Departure Time: 4:00 pm

Return Date: 3/22/25 Return Time: 2:00 pm

Mode of Transportation: School Vans & 7-Passenger Vans from Sexton Automotive

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: Aaron Green / Ronnie Scott / Craig Price / Drayton Hawl

Driver's License Verified by: TSeals 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: Courtyard Nashville SE / Murfreesboro

Address: 1306 Greshampark Drive

City: Murfreesboro State: TN Zip: 37129

Phone: 833-372-1913 Contact Person: Emily Crowell

Number of Nights: 4 Hotel Rating: 8.5

Name of School Sponsor/Date: H. Aaron Green

Signature of School Sponsor: H. Aaron Green Digitally signed by H. Aaron Green  
Date: 2025.03.11 08:19:07 -04'00' Cell #: 423-595-1829

*Minimum requires teacher to student ratio:*

*PreK – 3 yr olds 1:4      K-2<sup>nd</sup> 1:6      3<sup>rd</sup>-4<sup>th</sup> 1:10      5<sup>th</sup>-8<sup>th</sup> 1:12      9<sup>th</sup>-12<sup>th</sup> 1:15*  
*4 yr olds 1:6*

# of Students: 13

# of Adults: 3

Chaperone/Student Ratio: 1:4

Professional Staff Chaperone(s)

- 1. Name: Aaron Green Cell #: 423-595-1829
- 2. Name: Ronnie Scott Cell #: 865-599-6970
- 3. Name: Craig Price Cell #: 423-298-6953
- 4. Name: Drayton Hawkins Cell #: 731-431-4946

Other Chaperone(s):

- 1. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 2. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 3. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

Field Trips which exceed \$25,000, involve out of the country travel, out of state travel or overnight stay 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)

*Booster & School*

No Cost      Paid by Students      Paid by School      Paid by School System

Substitute Required      Acct to be charged for Substitute N/A

\$ 0.00 Per Student      TOTAL TRIP AMOUNT: \$ 14,000.

Provisions for those students unable to pay: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_

Staff Member: H. Aaron Green

Date: 3/11/25

Athletic Director: Joe Gaddis

Date: 3/11/25

**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: 3/11/25

Principal's Action:

Approved: ✓

Disapproved:

Principal's Signature: \_\_\_\_\_

Stephanie J. Hips

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

3-11-25

Superintendent or Designee's Action: Approved: \_\_\_\_\_

Disapproved: \_\_\_\_\_

Superintendent or Designee's Signature: \_\_\_\_\_

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

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

**Rooming list for Oak Ridge Boys Basketball (These rooms below will be paid for by the school and are tax exempt)**

Room 1 (Double Beds)- Aaron Green (Head Coach)

Room 2 (Double Beds)- Ronnie Scott (Asst. Coach)

Room 3 (Double Beds)- Craig Price (Asst. Coach)

Room 4 (King)- Danny Green (Asst Coach)

Room 5 (King)- Drayton Hawkins (Principal)

Room 6 (King)- Joe Gaddis (Athletic Director)

Room 7 (King)- Brian Loeffler (Trainer)

Room 8 (Double Beds) – PLAYERS-Cooper Williams, Raquan Watson, Garrett Giles, Shamar Greene

Room 9 (Double Beds)- PLAYERS- Malik Howard, Jarell Jemerson, Ethan James, Luis Sora

Room 10 (Double Beds)- PLAYERS- Charlie Taubehiem, Eli Peters, Josh Amos, Dallin James

**The rooms below will be paid for by the booster club**

Room 12 (Double Beds) – Aaron Green (Head Coach Extra Room)

## **Itinerary for March 18 – 22, 2025 – Oak Ridge Boys Basketball Team – Varsity**

### **March 18**

12:000 pm est – Leave for Murfreesboro

2:15 pm ETSU Practice

6:00 pm cst – Arrive at Hotel

7:30 pm - Eat Dinner as a team

9:30 pm – Back to Hotel

### **March 19**

8:30 am – Breakfast at Hotel

10:00 am – 12:00 pm – Practice at TSU or Belmont

12:30 pm – Team Lunch

1:30 pm – Back to Hotel

2:00 pm – 6:00 pm - TBD

6:00 pm – Team Dinner

8:30 pm – Back to Hotel

### **March 20**

9:00 am – Breakfast at Hotel

10:00 am – 11:00 pm – Shoot Around at Oakland High School

11:30 am – Team Lunch

12:30 pm – Back to Hotel

5:00 pm – Depart Hotel for Game

7:15 pm – 1<sup>st</sup> Round game vs Walker Valley

TBD – Team Dinner

TBD – Back to Hotel

### **March 21 and 22**

All with be determined after our game on Thursday.

**OAK RIDGE SCHOOLS**  
**CAMPUS LEAVE REQUEST – Overnight Trip**

Accommodations: Overnight lodging for students must be appropriately selected with student safety, quality of accommodations, cost, and location to events as central considerations. Students should be appropriately assigned to rooms and an overnight adult supervision and contact plan should be established and communicated to students.

School: ORHS Date: 3/21/25

*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 Cheerleaders

Educational Activity: Support basketball team for State competition

Destination: Murfreesboro, TN

Purpose of Trip: Support basketball team for State competition

Departure Date: 3/21/25 Departure Time: 3:00 pm

Return Date: 3/22/25 Return Time: 6:00 pm

Mode of Transportation: Parent transports

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: Marriott Courtyard

Address: 1306 Greshampark Drive

City: Murfreesboro State: TN Zip: 37129

Phone: 833-372-1913 Contact Person: Emily Crowell

Number of Nights: 1 Hotel Rating: 8.5

Name of School Sponsor/Date: Julie Hutchison

Signature of School Sponsor: Julie Hutchison Digitally signed by Julie Hutchison Date: 2025.03.21 15:48:19 -04'00' Cell #: 865-742-9825

*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: 6 # of Adults: 2 Chaperone/Student Ratio: 1:3

Professional Staff Chaperone(s)

1. Name: Julie Hutchison Cell #: 865-742-9825
2. Name: Christy Lamon Cell #: 865-659-2019
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, involve out of the country travel, out of state travel or overnight stay 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 \_\_\_\_\_

\$ \_\_\_\_\_ Per Student      TOTAL TRIP AMOUNT: \$ \_\_\_\_\_

Provisions for those students unable to pay: \_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_

Staff Member: Julie Hutchison

Date: 3/21/25

Athletic Director: Joe Gaddis

Date: 3/21/25

**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 B. Gaddis

Digitally signed by Joe B. Gaddis  
Date: 2025.03.21 15:53:10 -04'00'

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

Principal's Action:  Approved:

Disapproved:

Principal's Signature: Drayton Hawkins

Digitally signed by Drayton  
Hawkins  
Date: 2025.03.21 16:53:37 -04'00'

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

Superintendent or Designee's Action:  Approved:

Disapproved:

Superintendent or Designee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

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



# Oak Ridge Schools

OFFICE OF  
Executive Director of Finance

Telephone (865) 425-9004

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## MEMORANDUM

**To:** Dr. Bruce Borchers, Superintendent of Schools  
**From:** Jenifer Van Dyke, <sup>JVD</sup> Executive Director of Finance  
**Subject:** **FY'25 Budget Transfer #2 & Budget Amendment #1**  
**Date:** February 24, 2025

The attached FY'25 Budget Transfer #2 & Budget Amendment #1 includes the following budget requests for Board of Education approval:

- Mid-Year adjustment & re-alignment of general fund salary, benefit, and expenditure budget items (budget/actual/encumbrances) based on YTD analysis.
- Place unencumbered budget funds into multiple substitute lines for additional substitute needs.
- Place unencumbered budget funds into other accounts for Trustee Commissions, Insurance Premiums, Additional Bus Routes, Transportation Software, IT position costs, Attorney Fees, & Naka Program expenses.
- Place unencumbered budget funds into student support accounts for the Afterschool Tutoring Program & World Language Testing.
- Addition of \$85,000 to the General Fund (Fund 141) budget to establish the budget for anticipated TISA "On-Behalf" payments.
- Addition of \$91,000 to General Fund (Fund 141) revenues to establish the budget for FEMA payments received.
- Addition of \$616,914.76 use of General Fund (Fund 141) Fund Balance.
- Establish budget in capital outlay expenditure account code for the ORHS East Loop Boiler & the Softball Field project.

- Addition of \$5,660.00 to the Extended Childcare Fund (Fund 146) to establish the budget for FY24 purchase orders that were carried into FY25.
- Addition of \$32,018.45 to the Cafeteria Fund (Fund 143) budget for FY24 purchase orders that were carried into FY25.
- All routine budget transfers and revisions from November 11, 2024, through February 5, 2025.

# FY 25 FYTD Budget Summary - Budget Transfer #2 & Budget Amendment #1

Fund	FY25 Original Approved Budget	Budget Amendment #1	Budget Transfer #1 & #2	FY25 Revised & Amended Budget Amounts
Fund 141 (General Fund)	\$ 75,708,960.00	\$ 792,914.76	\$ -	\$ 76,501,874.76
Fund 142 (Federal)	\$ 4,817,440.00	\$ -	\$ -	\$ 4,817,440.00
Fund 143 (Food Service)	\$ 3,294,272.00	\$ 32,018.45		\$ 3,326,290.45
Fund 145 (Other Education)	\$ 159,434.00		\$ -	\$ 159,434.00
Fund 146 (Extended Child Care)	\$ 499,932.00	\$ 5,660.00		\$ 505,592.00
<b>TOTAL All Funds</b>	<b>\$ 84,480,038.00</b>	<b>\$ 830,593.21</b>	<b>\$ -</b>	<b>\$ 85,310,631.21</b>

## Fund 141 Budget Transfers

Fund 141 REVENUES	Account Number	Decrease	Increase
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Contingency Adjustment	141 R 46515 000 000 00010 000	\$ 90,000.00	\$ -
	141 R 46980 000 000 00000 000	\$ -	\$ 90,000.00

Fund 141 EXPENDITURES	Account Number	Increase	Decrease
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Innovative Schools Model - Transfer from Capital Outlay to Supplies & Materials	141 E 71300 429 023 00025 000	\$ 10,000.00	\$ -
	141 E 76100 399 023 00025 000	\$ -	\$ 10,000.00

Transfer for JMS Main Office	141 E 76100 707 000 00000 411	\$ 36,500.00	\$ -
	141 E 72610 434 000 00000 000	\$ -	\$ 36,500.00

Transfer for Purchase of 10 Ton Water Source Heat Pump	141 E 72620 399 000 00000 000	\$ 9,500.00	\$ -
	141 E 76100 707 000 00000 403	\$ -	\$ 9,500.00

<b>TOTAL</b>		<b>\$ 146,000.00</b>	<b>\$ 146,000.00</b>
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## GENERAL FUND - Mid Year Salary, Benefit, & Expense Realignment

Fund 141 EXPENDITURES	Account Number	Increase	Decrease
<b>New Spending Requests</b>			
Additional Substitute Pay	141-71100-195	\$ 10,000.00	
Additional Substitute Pay - SCA	141-71150-195	\$ 7,000.00	
Additional Substitute Pay - Nurses	141-72120-195	\$ 3,000.00	
Softball Field	141-76100-707	\$ 1,250,000.00	
Liability Insurance Premium	141-72310-506	\$ 6,654.00	
Trustee Commission	141-72310-510	\$ 5,000.00	
Transportation Software	141-72710-471	\$ 1,755.00	
Vehicle Insurance Premium	141-72710-511	\$ 6,123.00	
ORHS East Loop Boiler	141-76100-707--413	\$ 245,000.00	
Settlement Attorney Fees	141-72310-599	\$ 166,750.00	
IT Position	141-72250-121	\$ 10,000.00	
24-25 Naka Expenses	141-72130-599-00052	\$ 2,715.00	
Additional Bus Route Costs	141-72710-312	\$ 50,000.00	
World Language Testing	141-72130-322-000-00035	\$ 4,716.00	
Afterschool Tutoring Program	141-71100-116---326	\$ 35,200.00	
		\$ -	
<b>TOTAL New Spending Requests</b>	<b>\$</b>	<b>1,803,913.00</b>	

### Payroll, Benefit, & Other Budgetary Changes: Based on current Budget to Actual vs Payroll Encumbrances on 1/30/25

Regular Education Teachers	141-71100-116		\$ (400,000.00)
Career Ladder	141-71100-117		\$ (4,500.00)
Homebound Teachers	141-71100-128	\$ 2,000.00	\$ -
Educational Assistants	141-71100-163		\$ (40,000.00)
Social Security	141-71100-201		\$ (45,000.00)
State Retirement	141-71100-204		\$ (15,000.00)
Medical Insurance	141-71100-207		\$ (10,000.00)

Dental Insurance	141-71100-208		\$	(4,000.00)
Employer Medicare	141-71100-212		\$	(10,000.00)
SRT State Retirement	141-71100-217	\$	600.00	
Vision Insurance	141-71100-299		\$	(500.00)
<b>Alternative Education Teachers</b>	141-71150-116-00036		\$	(200.00)
Educational Assistants	141-71150-163 -00036	\$	375.00	
Social Security	141-71150-201-00036		\$	(150.00)
State Retirement	141-71150-204-00036	\$	350.00	
Medical Insurance	141-71150-207-00036		\$	(3,000.00)
Dental Insurance	141-71150-208-00036	\$	3.00	
SRT State Retirement	141-71150-217-00036		\$	(100.00)
Vision Insurance	141-71150-299-00036		\$	(20.00)
<b>Special Education</b>				
Educational Assistants	141-71200-163		\$	(20,000.00)
Educational Assistants - Substitute	141-71200-163---195	\$	20,000.00	
State Retirement	141-71200-204		\$	(600.00)
Medical Insurance	141-71200-206	\$	500.00	\$ -
Employer Medicare	141-71200-299	\$	100.00	
<b>Vocational Education</b>				
Teachers	141-71300-116-00035		\$	(7,900.00)
Educational Assistants	141-71300-163-00035	\$	7,900.00	\$ -
Certified Substitute Teachers	141-71300-195	\$	2,000.00	
Social Security	141-71300-201		\$	(2,000.00)
State Retirement	141-71300-204		\$	(500.00)
Medical Insurance	141-71300-207-00035		\$	(10,000.00)
Employer Medicare	141-71300-212		\$	(300.00)
SRT State Retirement	141-71300-217		\$	(750.00)

<b>Instructional Contingency</b>	141-71900-001	\$	-	\$ (199,522.05)
Instructional Contingency - Salary/Benefit	141-71900-002	\$	-	\$ (100,000.00)
Instructional Contingency - Other	141-71900-004	\$	-	\$ (27,656.69)
<b>Health Services</b>				
Medical Personnel	141-72120-131-00030			\$ (2,000.00)
Social Security	141-72120-201			\$ (300.00)
State Retirement	141-72120-204	\$	900.00	
Medical Insurance	141-72120-207	\$	1,000.00	
Dental Insurance	141-72120-208			\$ (500.00)
Employer Medicare	141-72120-212			\$ (75.00)
SRT State Retirement	141-72120-217	\$	820.00	
Vision Insurance	141-72120-299	\$	-	\$ (150.00)
<b>Other Student Support</b>				
School Counseling	141-72130-123	\$	-	\$ (13,000.00)
Other Salaries & Wages	141-72130-189	\$	1.00	\$ -
Social Security	141-72130-201	\$	-	\$ (2,000.00)
State Retirement	141-72130-204	\$	-	\$ (750.00)
Medical Insurance	141-72130-207	\$	11,000.00	
Dental Insurance	141-72130-208	\$	-	\$ (20.00)
Employer Medicare	141-72130-212			\$ (500.00)
SRT State Retirement	141-72130-217			\$ (150.00)
Other Charges	141-72130-599-00030-100	\$	8,469.50	
<b>Instructional Support</b>				
Director	141-72210-105			\$ (9,000.00)
Career Ladder	141-72210-117	\$	500.00	\$ -
Curriculum & Technology Integration Facilitators	141-72210-138			\$ (7,617.00)
Secretaries	141-72210-161			\$ (32,000.00)
Instructional Coaches	141-72210-172			\$ (100,000.00)
Other Salaries & Wages	141-72210-189			\$ (121,752.00)
Social Security	141-72210-201			\$ (16,000.00)
State Retirement	141-72210-204			\$ (11,000.00)

Life Insurance	141-72210-206		\$	(300.00)
Medical Insurance	141-72210-207		\$	(11,000.00)
Employer Medicare	141-72210-212		\$	(3,500.00)
SRT State Retirement	141-72210-217		\$	(250.00)
Vision Insurance	141-72210-299		\$	(100.00)
<b>Special Education Support</b>				
Career Ladder	141-72220-117		\$	(1,000.00)
Secretaries	141-72220-161	\$	3,500.00	
Medical Insurance	141-72220-207		\$	(3,500.00)
<b>Technology Career Support</b>				
Social Security	141-72230-201		\$	(150.00)
State Retirement	141-72230-204	\$	31.00	
Dental Insurance	141-72230-208	\$	1.00	
<b>Technology Services</b>				
Computer Programmers	141-72250-120	\$	1.00	
Overtime	141-72250-187		\$	(5,000.00)
Social Security	141-72250-201		\$	(300.00)
Life Insurance	141-72250-206	\$	50.00	
Medical Insurance	141-72250-207	\$	2,500.00	
Dental Insurance	141-72250-208	\$	160.00	
<b>Adult Programs</b>				
Other Salaries & Wages	141-72260-189	\$	1,340.00	
Social Security	141-72260-201		\$	(20.00)
State Retirement	141-72260-204	\$	120.00	
Medical Insurance	141-72260-207	\$	9,500.00	
Dental Insurance	141-72260-208	\$	1.00	

**Communications**

Director	141-72290-105	\$	3,618.00	
Other Salaries & Wages	141-72290-189	\$	39,303.00	
Social Security	141-72290-201	\$	2,600.00	
State Retirement	141-72290-204	\$	2,781.00	
Life Insurance	141-72290-206	\$	85.00	
Medical Insurance	141-72290-207	\$	8,290.00	
Dental Insurance	141-72290-208	\$	240.00	
Medicare	141-72290-212	\$	615.00	
Vision Insurance	141-72290-299	\$	72.00	

**Board of Education**

Unemployment Compensation	141-72310-210			\$	(5,000.00)
Payments to Retirees	141-72320-213	\$	5,000.00		

**Office of Superintendent**

Overtime	141-72320-187			\$	(2,500.00)
Other Salaries & Wages	141-72320-189	\$	1,000.00		
Social Security	141-72320-201	\$	500.00		
State Retirement	141-72320-204	\$	7,240.00		
Life Insurance	141-72320-206	\$	300.00		
Medical Insurance	141-72320-207			\$	(100.00)
Dental Insurance	141-72320-208	\$	1.00		

**Office of Principal Principals - RMS**

Principals - WB	141-72410-104-00040	\$	27,420.00	\$	-
Career Ladder	141-72410-104-00045	\$	8,530.00		
Bookkeepers	141-72410-117	\$	1,500.00	\$	-
Assistant Principals - JMS	141-72410-119-00040	\$	-	\$	(7,600.00)
Assistant Principals - ORHS	141-72410-139-00025	\$	4,000.00		
Assistant Principals - WB	141-72410-139-00035	\$	111,600.00		
Secretary	141-72410-139-00045	\$	4,000.00		
Social Security	141-72410-161			\$	(15,000.00)
State Retirement	141-72410-201	\$	4,130.00		
	141-72410-204	\$	5,000.00	\$	-

Life Insurance	141-72410-206	\$	400.00	
Medical Insurance	141-72410-207	\$	11,000.00	
Employer Medicare	141-72410-212	\$	1,000.00	
SRT State Retirement	141-72410-217			\$ (500.00)
Vision Insurance	141-72410-299	\$	30.00	
<b>Fiscal Services</b>				
Director	141-72510-105	\$	6,138.00	
Accountants	141-72510-119	\$	8,603.00	
Purchasing	141-72510-122			\$ (2,600.00)
Clerical Personnel	141-72510-161	\$	-	\$ (18,000.00)
Overtime	141-72510-187			\$ (1,000.00)
Other Salaries & Wages	141-72510-189			\$ (1,500.00)
Social Security	141-72510-201			\$ (1,500.00)
State Retirement	141-72510-204	\$	-	\$ (3,000.00)
Medical Insurance	141-72510-207	\$	15,250.00	
Dental Insurance	141-72510-208	\$	300.00	
Employer Medicare	141-72510-212			\$ (200.00)
SRT State Retirement	141-72510-217			\$ (700.00)
Vision Insurance	141-72510-299	\$	84.00	
Software	141-72510-471			\$ (20,000.00)
<b>Human Resources</b>				
Secretaries	141-72520-161			\$ (1,000.00)
Other Salaries & Wages	141-72520-189	\$	5,000.00	
Social Security	141-72520-201	\$	15.00	
State Retirement	141-72520-204	\$	95.00	
Medical Insurance	141-72520-207	\$	3,200.00	
Dental Insurance	141-72520-208	\$	2.00	
Employer Medicare	141-72520-212	\$	20.00	
SRT State Retirement	141-72520-217	\$	45.00	

**Operation of Plant**

Director	141-72610-105	\$	1.00	
Secretaries	141-72610-161		\$	(13,000.00)
Custodial Personnel	141-72610-166		\$	(80,000.00)
Overtime	141-72610-187		\$	(300.00)
Social Security	141-72610-201	\$	-	\$ (4,000.00)
State Retirement	141-72610-204		\$	(12,000.00)
Medical Insurance	141-72610-207		\$	(7,000.00)
Employer Medicare	141-72610-212	\$	-	\$ (500.00)
SRT State Retirement	141-72610-217	\$	-	\$ (1,500.00)
Vision Insurance	141-72610-299	\$	-	\$ (25.00)

**Maintenance of Plant**

Supervisor/Director	141-72620-105	\$	1.00	
Secretaries	141-72620-161	\$	1,667.00	
Maintenance Personnel	141-72620-167	\$	-	\$ (30,000.00)
Social Security	141-72620-201		\$	(2,000.00)
State Retirement	141-72620-204		\$	(1,000.00)
Medical Insurance	141-72620-207	\$	-	\$ (5,000.00)
Dental Insurance	141-72620-208		\$	(100.00)
Employer Medicare	141-72620-212		\$	(300.00)
SRT State Retirement	141-72620-217		\$	(300.00)

**Preschool Program**

Principal	141-73401-104	\$	1.00	
Medical Personnel	141-73401-131	\$	-	\$ (3,500.00)
Secretaries	141-73401-161		\$	(8,600.00)
Educational Assistants	141-73401-163	\$	-	\$ (2,000.00)
Custodial Personnel	141-73401-166	\$	6,100.00	
Overtime	141-73401-187	\$	300.00	\$ -
State Retirement	141-73401-204	\$	4,500.00	\$ -
Life Insurance	141-73401-206	\$	150.00	\$ -

Medical Insurance	141-73401-207	\$	23,000.00	
Dental Insurance	141-73401-208	\$	400.00	
Vision Insurance	141-73401-299	\$	110.00	
<b>TOTAL</b>			<b>\$ 2,287,872.50</b>	<b>\$ (2,287,872.50)</b>

## Budget Amendments To Be Presented to City Spring 2025

Fund 141 REVENUES	Account Number	Decrease	Increase
Establish TISA on Behalf Payments	141 R 46513 000 000 00000 000	\$ -	\$ 85,000.00
Establish FEMA Revenue Budget	141 R 47590 000 000 00000 000	\$ -	\$ 91,000.00
Fund 141 EXPENDITURES	Account Number	Increase	Decrease
Establish TISA On Behalf Payments	141 E 71100 595 000 00000 000	\$ 85,000.00	\$ -
Fund 141 FUND BALANCE	Account Number		
Use of Fund Balance	141 Q 39000 000 000 00000 000	\$ -	\$ 616,914.76
<b>TOTAL</b>		<b>* \$ 85,000.00</b>	<b>\$ 792,914.76</b>

\* Reflected in mid-year totals

<b>Fund 143 EXPENDITURES</b>	<b>Account Number</b>	<b>Increase</b>	<b>Decrease</b>
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Establish Budget for Carryover Purchase Orders	143 E 73100 710 001 00000 000	\$ 32,018.45	\$ -
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<b>Fund 143 FUND BALANCE</b>	<b>Account Number</b>
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Establish Budget for Carryover Purchase Orders	143 Q 39000 000 000 00000 000	\$ -	\$ 32,018.45
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<b>Fund 146 EXPENDITURES</b>	<b>Account Number</b>	<b>Increase</b>	<b>Decrease</b>
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Establish Budget for Carryover Purchase Orders	146 E 73300 711 001 00000 000	\$ 5,660.00	\$ -
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<b>Fund 146 FUND BALANCE</b>	<b>Account Number</b>
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Establish Budget for Carryover Purchase Orders	146 Q 39000 000 000 00000 000	\$ -	\$ 5,660.00
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**FY24-25 Tenure Eligible**

**Melissa Morris – Secret City Academy**



# Oak Ridge Schools

## PRESCHOOL

Board of Education Request for Approval

Preschool Head Start Baseline Grant 2025-2026

I respectfully request the approval of the Preschool Head Start Baseline Grant proposal for 2025-2026. This grant is the Baseline Grant that gets written every 5 years. The amount requested in the grant is \$1,075,035. The basic grant is in the amount of \$1,065,718 and the T/TA is \$9,317 for the total of \$1,075,035. This grant provides the funding for 118 3- and 4-year-old students.

The grant proposal is included.

Respectfully,

**Mrs. Lisa M Downard**

**Principal**

157 Carver Ave | Oak Ridge, TN 37830

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

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

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# Oak Ridge Schools

## PRESCHOOL

2025-2026

Head Start Baseline Grant

Oak Ridge Schools' Head Start-Delegate

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## 1. Program Goals, Measurable Objectives, and Expected Outcomes (a-c)

### Subsection A: Goals

A copy of the full program goals template is uploaded under supporting documents.

<b>Program Goal 1: (Health)</b>	Oak Ridge Schools' Preschool/HeadStart will promote comprehensive health and mental health practices that enhance the overall well-being of preschool children and their families, to foster an environment conducive to active participation in educational opportunities.
<b>Objective 1:</b>	Implement regular dental screenings and provide education on proper oral hygiene practices, ensuring that all children develop healthy dental habits that support their overall well-being. The number of children receiving regular dental screenings will increase by 2% each year through the end of the grant cycle.
<b>Expected Outcome(s):</b>	Enrolled students will have better access to dental care. By increasing the frequency of dental visits, we expect improved oral health outcomes, which will support overall health and well-being. This, in turn, will reduce dental-related issues that hinder learning, leading to better concentration, attendance, and participation in the classroom.
<b>Expected Challenges:</b>	We anticipate several challenges related to achieving our outcome. First, some parents may be hesitant to allow their children to receive dental screenings in the school setting without their presence, which could limit participation. Additionally, securing dental providers willing to come to the school twice a year may prove difficult due to limited provider availability in the community. Increasing awareness among families about the importance of dental care and engaging them in the process may also require additional outreach and educational efforts. Finally, coordinating schedules between families, providers, and the school could present logistical barriers that impact the frequency of screenings and care.

<b>Program Activities that support both goals &amp; objectives:</b>	<b>Person(s) Responsible:</b>	<b>Timeline</b>	<b>Financial Supports:</b>	<b>Data Tools or Methods for Tracking Progress:</b>
1. Seek community partnerships to conduct at least 1 age-appropriate oral hygiene education	<ul style="list-style-type: none"> <li>Family and Community Engagement Manager</li> <li>School Nurse</li> </ul>	Throughout each School Year	N/A	<ul style="list-style-type: none"> <li>List of Dental Providers Contacted</li> <li>Sign in Sheets for Events/Visitors</li> </ul>

session per year for each classroom				<ul style="list-style-type: none"> <li>Volunteer Logs</li> </ul>
2. Seek community partners to help distribute dental care kits (toothbrushes, toothpaste, floss) to 100% of enrolled children twice per year, including age-appropriate oral health education materials.	<ul style="list-style-type: none"> <li>Family and Community Engagement Manager</li> <li>School Nurse</li> </ul>	Fall and Spring	N/A	<ul style="list-style-type: none"> <li>List of Dental Providers Contacted</li> <li>Sign in Sheets for Events/Visitors</li> <li>Volunteer Logs</li> </ul>
3. Increase the number of enrolled children who receive regular dental screenings. <ul style="list-style-type: none"> <li>i. Baseline will be established using 2024-2025 end of year school data.</li> <li>ii. Year 1-5: Increase the percentage of children screened by 2% each year.</li> </ul>	<ul style="list-style-type: none"> <li>School Nurse</li> </ul>	End of each school year report	N/A	<ul style="list-style-type: none"> <li>Student Health Records</li> <li>Program's Data Management System</li> </ul>
4. Track the percentage of children receiving necessary follow-up dental care after screenings.	<ul style="list-style-type: none"> <li>School Nurse</li> </ul>	Quarterly Scheduled Report	N/A	<ul style="list-style-type: none"> <li>Student Health Records</li> <li>Program's Data Management System</li> </ul>

<b>Program Goal 1: (Health)</b>	Oak Ridge Schools' Preschool/HeadStart will promote comprehensive health and mental health practices that enhance the overall well-being of preschool children and their families, to foster an environment conducive to active participation in educational opportunities.
<b>Objective 2:</b>	Continue to incorporate Conscious Discipline as a Social Emotional initiative to help children develop essential skills such as self-regulation, empathy, and resilience, which are crucial for their emotional well-being. Teachers will increase their use of Conscious Discipline concepts by 5%

	each year as measured by the Conscious Discipline Personal Implementation Guide for Teachers.
<b>Expected Outcome(s):</b>	Enrolled students will have enhanced essential skills like self-regulation, empathy, and resilience, which are crucial for emotional well-being and school readiness. As teachers strengthen their use of Conscious Discipline concepts, we expect children to better manage their emotions and build positive relationships with peers and adults. This growth will contribute to students' overall health and well-being, reduce behavioral challenges, and create a supportive learning environment.
<b>Expected Challenges:</b>	We anticipate challenges such as staff turnover, which can disrupt training and support for Conscious Discipline, and environmental stressors faced by families, like economic hardships, that may impact students' emotional well-being and engagement.

<b>Program Goal 1: (Health)</b>	Oak Ridge Schools' Preschool/HeadStart will promote comprehensive health and mental health practices that enhance the overall well-being of preschool children and their families, to foster an environment conducive to active participation in educational opportunities.
<b>Objective 3:</b>	Provide resources and workshops for families to enhance their understanding of mental health, identify signs of stress or emotional challenges, and acquire effective coping strategies. Each year, a minimum of 60% of participating parents will demonstrate a solid understanding of the fundamentals of Conscious Discipline, as assessed by pre- and post-tests administered before and after each workshop session.
<b>Expected Outcome(s):</b>	The program will experience a more cohesive and effective learning environment. The alignment between classroom experiences and parent education will ensure that parents are equipped with the same strategies and language used in the classroom, fostering a unified approach to supporting children's emotional and social development. Parents will demonstrate a willingness to use some of the tenants from Conscious Discipline with their children at home which creates a unified approach to support families.
<b>Expected Challenges:</b>	One challenge is the potential for low attendance rates among parents and caregivers at events aimed at parent education. Factors such as scheduling conflicts, lack of awareness, or competing priorities may hinder participation. Even with attendance, we may face issues related to engagement during the workshops, as parents may come with varying levels of interest or familiarity with the topics. Furthermore, ensuring that parents not only understand but also retain and implement the concepts taught poses another challenge. Without ongoing support and reinforcement, parents may struggle to apply the strategies in their daily lives.

Program Activities that support both goals & objectives:	Person(s) Responsible:	Timeline	Financial Supports:	Data Tools or Methods for Tracking Progress:
1. Conduct at least 4 parent Conscious Discipline workshops for families each year.	<ul style="list-style-type: none"> <li>• Family and Community Engagement Manager</li> <li>• Family Services Staff</li> </ul>	Throughout each School Year	<ul style="list-style-type: none"> <li>• Explore budgeting funds for dinner/babysitting for workshops in the evening</li> <li>• T/TA funds for yearly Premium Membership to Conscious Discipline</li> </ul>	<ul style="list-style-type: none"> <li>• Weekly Newsletters</li> <li>• Schedule of Parent Events on School Calendar</li> <li>• Parent Sign in Sheets</li> </ul>
<p>2. Increase the parental/caregiver attendance in the Conscious Discipline workshops.</p> <p>i. Year 1: Due to utilizing this new training model, we will create a baseline for parental/caregiver attendance in the Conscious Discipline workshops.</p> <p>ii. In Years 2-4: Increase parental/caregiver attendance by 2% each year.</p>	<ul style="list-style-type: none"> <li>• Family and Community Engagement Manager</li> <li>• Family Services Staff</li> </ul>	Throughout each School Year	<ul style="list-style-type: none"> <li>• Budget for incentives to give away</li> </ul>	<ul style="list-style-type: none"> <li>• Parent Sign in Sheets</li> </ul>
3. Administer pre/post tests before and after each workshop to assess changes in understanding of the basics of child	<ul style="list-style-type: none"> <li>• Family and Community Engagement Manager</li> </ul>	At the beginning and end of each workshop	N/A	<ul style="list-style-type: none"> <li>• Pre and Post tests from each workshop</li> </ul>

regulation and other tenants of Conscious Discipline.				
4. Develop a Mental Health section on the school newsletter that includes tips and information about Conscious Discipline.	<ul style="list-style-type: none"> <li>• Director</li> <li>• Family and Community Engagement Manager</li> <li>• Education Coordinator</li> </ul>	Weekly	N/A	<ul style="list-style-type: none"> <li>• Weekly Newsletters</li> </ul>

<b>Program Goal 2: (Nutrition)</b>	Oak Ridge Schools' Preschool/HeadStart will enhance the nutritional knowledge and habits of preschool children and their families by promoting classroom cooking experiences of nutritious foods, implementing an organic school garden, engaging with community partners to support healthy eating at home, and establishing a Healthy Schools Committee.
<b>Objective 1:</b>	To integrate hands-on cooking activities in the classroom where children participate in preparing nutritious meals, fostering an understanding of healthy eating habits and food choices. The number of classrooms completing a cooking activity at least once a month will increase by 10% each year.
<b>Expected Outcome(s):</b>	Integrating hands-on cooking activities in the classroom is expected to yield positive results in students' understanding of nutrition and healthy eating habits. As more classrooms participate in monthly cooking activities, we anticipate an increase in students' knowledge of food preparation, nutritional value, and the importance of balanced meals.
<b>Expected Challenges:</b>	There will be concerns about allergies and dietary restrictions, requiring careful planning and ingredient selection. Time constraints within the existing curriculum and the need for additional resources (such as cooking equipment and ingredients) will also pose logistical and budgetary challenges.

<b>Program Goal 2: (Nutrition)</b>	Oak Ridge Schools' Preschool/HeadStart will enhance the nutritional knowledge and habits of preschool children and their families by promoting classroom cooking experiences of nutritious foods, implementing an organic school garden, engaging with community partners to support healthy eating at home, and establishing a Healthy Schools Committee.
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<b>Objective 2:</b>	To establish an organic school garden where children can participate in planting, caring for, and harvesting vegetables and fruits, promoting an understanding of where food comes from and the benefits of eating fresh produce. The program will increase the number of classrooms participating in caring for the school garden by 10% each year.
<b>Expected Outcome(s):</b>	Preschoolers participating in the organic school garden program will likely develop a basic understanding of where food comes from and show increased interest in eating fresh fruits and vegetables. The hands-on nature of gardening activities will enhance fine motor skills, promote sensory exploration, and foster early science concepts such as plant growth and weather.
<b>Expected Challenges:</b>	The primary challenge for the preschool garden program is the uncertainty of grant funding from year to year, which significantly impacts the program's sustainability and ability to grow. This financial instability could affect all aspects of the garden, from purchasing supplies to maintaining the space. Additional challenges include adapting gardening tasks to be age-appropriate and safe for preschoolers, maintaining young children's attention during activities, and dealing with limited outdoor space or unsuitable weather conditions.

<b>Program Activities that support both goals &amp; objectives:</b>	<b>Person(s) Responsible:</b>	<b>Timeline</b>	<b>Financial Supports:</b>	<b>Data Tools or Methods for Tracking Progress:</b>
1. Involve families in gardening activities, creating opportunities for them to learn about sustainable practices and the importance of including fresh foods in their diets.	<ul style="list-style-type: none"> <li>Family and Community Engagement Manager</li> </ul>	Throughout each School Year	Seek grant-based funding through a partnership with GROW Oak Ridge to provide education and materials.	<ul style="list-style-type: none"> <li>Schedule of Parent Events on School Calendar</li> <li>Parent Sign in Sheets</li> </ul>

<p>2. Seek out grant funding to start a school community garden and hire a consultant to help increase the sustainability of the garden and provide education.</p>	<ul style="list-style-type: none"> <li>• Education Coordinator</li> <li>• Curriculum Coach</li> <li>• Family and Community Engagement Manager</li> </ul>	<p>Throughout each School Year</p>	<p>Explore grant funding and community partnerships to provide funding and support</p>	<ul style="list-style-type: none"> <li>• Grant proposals</li> <li>• Volunteer Logs</li> <li>• School Newsletters</li> </ul>
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<p><b>Program Goal 2: (Nutrition)</b></p>	<p>Oak Ridge Schools' Preschool/HeadStart will enhance the nutritional knowledge and habits of preschool children and their families by promoting classroom cooking experiences of nutritious foods, implementing an organic school garden, engaging with community partners to support healthy eating at home, and establishing a Healthy Schools Committee.</p>
<p><b>Objective 3:</b></p>	<p>To form a Healthy Schools Committee that includes staff, parents, and community members to oversee and promote nutrition and wellness initiatives within the program. The number of stakeholders participating in nutrition and wellness initiatives within the program will increase by 10% each year as measured by sign in sheets and participation logs.</p>
<p><b>Expected Outcome(s):</b></p>	<p>The formation of a Healthy Schools Committee is expected to increase engagement in nutrition and wellness initiatives across the preschool community. With diverse representation from staff, parents, and community members, the committee will likely introduce innovative ideas and implement effective strategies to promote healthy habits among preschoolers.</p>
<p><b>Expected Challenges:</b></p>	<p>The primary challenge will be maintaining consistent stakeholder engagement and meeting the 10% annual increase in participation. Coordinating schedules for regular committee meetings and events may prove difficult given the varied commitments of parents, staff, and community members.</p>

<p><b>Program Goal 3: (Family and Community Engagement)</b></p>	<p>Oak Ridge Schools' Preschool/ HeadStart will strengthen family and community engagement by addressing chronic absenteeism, increasing parental involvement in classroom and building experiences, and fostering inclusive male engagement throughout all program activities.</p>
<p><b>Objective 1:</b></p>	<p>To maintain chronic absenteeism for unexcused absences below 10% of enrolled students throughout the academic year using the average daily attendance report to track attendance.</p>

<b>Expected Outcome(s):</b>	To improve access to educational opportunities for children, fostering a more stable learning environment. By developing effective communication channels, families will be better informed about attendance policies, the significance of regular attendance, and the resources available to assist them, which in turn will promote accountability and engagement. Educating and training teachers and classroom staff on the importance of attendance will empower them to engage effectively with families, encouraging an active role in promoting attendance through their interactions with students and parents. Collectively, these outcomes are likely to create a supportive network that enhances student attendance and overall academic success.
<b>Expected Challenges:</b>	Challenges include maintaining consistent family engagement, especially during stressful periods, and resource limitations for implementing support strategies. Staff or family resistance to new attendance policies may occur if root causes aren't addressed. Balancing accountability with support is crucial, as overly punitive measures could discourage engagement.

<b>Program Goal 3: (Family and Community Engagement)</b>	Oak Ridge Schools' Preschool/ Head Start will strengthen family and community engagement by addressing chronic absenteeism, increasing parental involvement in classroom and building experiences, and fostering inclusive male engagement throughout all program activities.
<b>Objective 2:</b>	To increase parental involvement in school activities and initiatives by 10% each year. This will be measured by tracking attendance at school events, participation in volunteer opportunities, and responses to parental surveys.
<b>Expected Outcome(s):</b>	A stronger home-school connection, characterized by more frequent and meaningful communication between parents and teachers, increased use of at-home learning activities, and higher parent satisfaction rates with school programs. As parental involvement grows, we anticipate an expansion of parental knowledge and skills, including a better understanding of child development milestones, increased confidence in supporting their child's learning at home, and enhanced skills in fostering early literacy and numeracy.
<b>Expected Challenges:</b>	A significant challenge in fostering parental involvement is overcoming parents' own negative educational experiences, which can lead to resistance in engaging with their child's school. The stress prevalent in many family systems, due to financial pressures or demanding schedules, often limits parents' ability to commit time and energy to school-related matters. Additionally, parent-teacher interactions are frequently constrained by time limitations, language barriers, or conflicting schedules, further hindering effective communication and collaboration.

Program Activities that support both goals & objectives:	Person(s) Responsible:	Timeline	Financial Supports:	Data Tools or Methods for Tracking Progress:
<p>1. Create a variety of opportunities for parents to engage in classroom and building experiences, such as volunteering, participating in workshops, and attending family events, to foster a sense of community and belonging.</p>	<ul style="list-style-type: none"> <li>Family and Community Engagement Manager</li> <li>Classroom Teachers</li> </ul>	<p>Throughout each school year</p>	<p>N/A</p>	<ul style="list-style-type: none"> <li>Volunteer Logs</li> <li>School Event Calendar</li> <li>School Newsletters</li> </ul>
<p>2. Encourage parents to share their skills and talents with the classroom, enhancing the learning environment and building stronger connections between families and educators.</p>	<ul style="list-style-type: none"> <li>Classroom Teachers</li> </ul>	<p>Throughout each year: when Classroom “Studies” indicate a need for Family Engagement and Wow! Experiences</p>	<p>N/A</p>	<ul style="list-style-type: none"> <li>Volunteer Logs</li> <li>Classroom Newsletter</li> <li>Lesson Plans</li> <li>Creative Curriculum Fidelity Tool</li> <li>PLC Meeting Agenda and Notes</li> </ul>
<p>3. Develop initiatives that promote male engagement in all program experiences, ensuring that fathers, grandfathers, and male role models are actively involved in their children's education and development</p>	<ul style="list-style-type: none"> <li>All Staff</li> </ul>	<p>Throughout each school year</p>	<p>N/A</p>	<ul style="list-style-type: none"> <li>Volunteer Logs</li> <li>PLC Meeting Agenda and Notes</li> </ul>

<p>4. Create a welcoming atmosphere that encourages male participation by offering flexible opportunities for involvement, such as family workshops, classroom activities, and community events tailored to their interests and schedules.</p>	<ul style="list-style-type: none"> <li>• All Staff</li> </ul>	<p>Throughout each School year</p>	<p>N/A</p>	<ul style="list-style-type: none"> <li>• PLC Meeting Agenda and Notes</li> </ul>
<p>5. Establish a system for collecting feedback from families regarding their experiences and suggestions for improvement in engagement practices, ensuring that the program remains responsive to their needs.</p>	<ul style="list-style-type: none"> <li>• Education Coordinator</li> <li>• Family and Community Engagement Manager</li> </ul>	<p>Within the first quarter</p>	<p>N/A</p>	<ul style="list-style-type: none"> <li>• Data from Program's Data Management System</li> </ul>
<p>6. Regularly assess the effectiveness of engagement initiatives and make data-driven adjustments to enhance participation, especially among male participants.</p>	<ul style="list-style-type: none"> <li>• Family and Community Engagement Manager</li> </ul>	<p>Throughout each school year and ongoing</p>	<p>N/A</p>	<ul style="list-style-type: none"> <li>• Data from Program's Data Management System</li> </ul>
<p>7. Increase face-to-face encounters between staff and families to deepen relationships with families which will lead to increased family engagement and participation.</p>	<ul style="list-style-type: none"> <li>• Family Service Staff</li> </ul>	<p>Throughout each school year</p>	<p>N/A</p>	<ul style="list-style-type: none"> <li>• Data from Program's Data Management System</li> </ul>

<b>Program Goal 4: (Education)</b>	Oak Ridge Schools' Preschool/HeadStart will establish a comprehensive tracking system that facilitates vertical alignment as students transition from preschool to kindergarten and beyond. The program will create a seamless educational continuum by collaborating with kindergarten teams within the district to ensure that our preschool curriculum aligns with the kindergarten standards and expectations.
<b>Objective 1:</b>	To establish regular meetings with kindergarten educators to discuss curriculum alignment, share best practices, and identify key developmental milestones by meeting with groups of LEA kindergarten educators at least once per year.
<b>Expected Outcome(s):</b>	These collaborations will foster shared best practices, leading to improved teaching strategies and clearer developmental milestones. We anticipate a more cohesive educational experience, resulting in better-prepared students and strengthened early childhood education programs.
<b>Expected Challenges:</b>	Coordinating schedules and ensuring consistent, meaningful participation from all stakeholders may prove difficult. Overcoming existing communication barriers or preconceptions between preschool and kindergarten educators could be challenging.

<b>Program Activities that support both goals &amp; objectives:</b>	<b>Person(s) Responsible:</b>	<b>Timeline</b>	<b>Financial Supports:</b>	<b>Data Tools or Methods for Tracking Progress:</b>
1. Explore opportunities to meet with kindergarten LEA educators to discuss vertical alignment between the program and the district's kindergartens.	<ul style="list-style-type: none"> <li>• Director</li> <li>• Education Coordinator</li> <li>• Curriculum Coach</li> <li>• District Principals</li> </ul>	Throughout each school year to be conducted at least once per year.	N/A	<ul style="list-style-type: none"> <li>• PD Schedule</li> <li>• LEA Calendar</li> </ul>
2. Set up visits to the LEA's kindergarten classrooms for preschool students to visit at the end of their preschool year to encourage a smooth transition.	<ul style="list-style-type: none"> <li>• Director</li> <li>• Education Coordinator</li> <li>• ERSA Manager</li> <li>• Curriculum Coach</li> <li>• Classroom Teachers</li> <li>• District's Kindergarten Teachers</li> </ul>	May of each school year.	N/A	<ul style="list-style-type: none"> <li>• Field Trip Forms</li> <li>• Volunteer Logs</li> <li>• School Calendar</li> <li>• Family Surveys</li> </ul>
3. Have preschool teachers complete a Kindergarten transition form to help Kindergarten teachers understand pertinent information about preschool students coming from Oak Ridge Schools' Preschool/HeadStart. Include work and writing Samples from students.	<ul style="list-style-type: none"> <li>• Director</li> <li>• Classroom Teachers</li> </ul>	In May of each school year.	N/A	<ul style="list-style-type: none"> <li>• End of Year Teacher Checkout List</li> </ul>
4. Work with the PLC Coaches at the LEA's Elementary Schools to collaborate on the priority standards for each Kindergarten team.	<ul style="list-style-type: none"> <li>• Curriculum Coach</li> </ul>	Throughout each school year. During weekly check-in with LEA	N/A	<ul style="list-style-type: none"> <li>• Curriculum Coach Meeting Calendar</li> </ul>

		PLC Coordinator.		
5. Review current preschool curriculum alongside kindergarten standards	<ul style="list-style-type: none"> <li>• Education Coordinator</li> <li>• Curriculum Coach</li> <li>• Classroom Teachers</li> </ul>	Throughout each year and during weekly PLC Meetings	N/A	<ul style="list-style-type: none"> <li>• PLC Meeting Agendas</li> <li>• PLC Meeting Notes</li> </ul>

<b>Program Goal 4: (Education)</b>	Oak Ridge Schools' Preschool/HeadStart will establish a comprehensive tracking system that facilitates vertical alignment as students transition from preschool to kindergarten and beyond. The program will create a seamless educational continuum by collaborating with kindergarten teams within the LEA to ensure that our preschool curriculum aligns with the kindergarten standards and expectations.
<b>Objective 2:</b>	To implement Power BI as a data tracking tool to monitor the progress of students transitioning from preschool to kindergarten and beyond. We will utilize data collected through Power BI to evaluate the effectiveness of our curriculum and transition practices at least once a year, making necessary adjustments based on student outcomes and feedback from kindergarten educators.
<b>Expected Outcome(s):</b>	The data-driven approach should allow for more effective evaluation of our teaching practices and transition strategies, resulting in continual program improvements. Ultimately, we expect to see enhanced student readiness for kindergarten and improved long-term academic outcomes.
<b>Expected Challenges:</b>	While the potential benefits are substantial, we anticipate several challenges in implementing Power BI for student tracking. Initial hurdles may include ensuring staff proficiency with the new system and maintaining consistent, accurate data entry across all classrooms. Additionally, interpreting the vast amount of data effectively and translating insights into actionable improvements may prove complex. Sustaining engagement with the system over time could prove to be challenging.

## School Readiness Goals

<b>Approaches to Learning</b>	Children will enhance their ability to persist in tasks and increase their ability to control impulses, in alignment with ELOF P-ATL-5 and P-ATL-7. Children will show persistence in completing tasks and challenges, fostering resilience and a positive approach to learning, while also practicing self-control in various situations.
<b>Social Emotional Development</b>	Children will strengthen their ability to form positive and trusting relationships with adults and peers, in alignment with ELOF P-SE-1, P-SE-2 and P-SE-5. Through consistent interactions and supportive experiences, children will demonstrate an increased willingness to seek help, engage in conversations, and share their thoughts and feelings with trusted adults in the classroom. Additionally, children will use basic problem-solving skills to resolve conflicts with other children, fostering collaboration and social skills in their interactions.
<b>Language and Literacy 1</b>	Children will enhance their language and communication skills, in alignment with ELOF P-LC-2 and P-LC-4. Children will demonstrate an increased ability to understand and respond to spoken language, as well as actively engage in conversations with peers and adults. Children will improve in their ability to express ideas, ask questions, and listen attentively during discussions, fostering meaningful interactions and supportive communication within the classroom environment.
<b>Language and Literacy 2</b>	Children will develop foundational literacy skills, in alignment with ELOF P-LIT-1 and P-LIT-3. Children will demonstrate an increased awareness of print concepts and the ability to recognize and manipulate sounds in spoken language. Children will show progress in identifying letters and engaging in activities that promote phonological awareness, such as rhyming and segmenting sounds. This goal aims to foster a love for reading and a strong foundation for future literacy development.
<b>Cognition 1</b>	Children will cultivate an understanding of scientific inquiry and exploration, in alignment with ELOF P-SCI-6. Children will demonstrate curiosity about the world around them and engage in hands-on investigations, asking questions, making observations, analyzing results, drawing conclusions, and communicating their findings based on their experiences. Children will show progress in their ability to explore materials and phenomena, use simple tools, and effectively communicate their results, fostering a lifelong interest in science and critical thinking skills.
<b>Cognition 2</b>	Children will develop foundational mathematical skills, in alignment with ELOF P-MATH-1 and P-MATH-3. Children will demonstrate an increased understanding of number sense. Children will show progress in recognizing and counting numbers, understanding quantity, and engaging with mathematical concepts through hands-on activities and play.
<b>Perceptual, Motor, and Physical Development</b>	Children will enhance their physical development skills and demonstrate knowledge of personal safety practices and routines, in alignment with ELOF P-PMP-3 and P-PMP-6. Children will demonstrate improved fine motor skills through activities such as cutting, drawing, and manipulating small objects. Additionally, children will show an understanding of personal safety by following routines and practices that promote their well-being. Children will show progress in their ability to coordinate movements and make safe choices, fostering a sense of responsibility and preparedness for future learning experiences.

d. The outcomes from the program's prior project period have significantly informed the new program goals. While the program successfully increased family engagement overall, it now aims to specifically enhance male participation through more integrated approaches, moving beyond isolated fatherhood events to involve male caregivers in regular, ongoing activities. The program will also increase face-to-face interactions between family advocates and all parents to deepen school-home relationships. The program effectively implemented many Family Engagement components from Creative Curriculum and plans to build on this by further empowering families as educators, leveraging their expertise in classroom topics to boost their confidence in teaching their children. Although the program made progress in improving overall attendance, one new objective includes a specific focus on reducing unexcused absences. Lastly, the program decided to align its parenting curriculum with existing classroom practices for better continuity. While the program saw progress in mental health and parenting education using Love and Logic during the prior project period, it recognizes the value of using consistent language and approaches across all aspects of the program. Therefore, the program will transition its parenting education curriculum to Conscious Discipline, which is already successfully implemented in the classrooms. This change will create a more unified approach, ensuring that families and staff are using the same language and strategies, thereby strengthening the educational partnership between school and home.

2. The program has conducted cross-analysis of the *HS ELOF*, the program's curriculum and Tennessee's Early Learning Developmental Standards, to ensure

alignment to the requirements and expectations of the Local Schools where children will transition.

3. As a delegate, the program has collaborated with the governing body, the Oak Ridge Schools' Board of Education, to develop program goals. Additionally, the program worked with the policy committee and parents to ensure a comprehensive approach. This process involved gathering input during the Community Assessment, Self-Assessment, and program planning, helping in identifying key areas of need and opportunity. A member of the Oak Ridge Schools' Board of Education participates on the Policy Committee, serving as a liaison between the program and the Board. This member reports to the Board, leads discussions, and keeps the Oak Ridge Board of Education informed about the program's direction and needs. Parents have shaped program goals through their input during Community and Self Assessments, providing valuable insights into family and community needs. To refine the objectives, the program presented a draft of the proposed goals to the Policy Committee for discussion and review. This process allowed the program to incorporate feedback and ensure its goals align with both community needs and organizational priorities.

## **Sub-Section B: Service Delivery**

### **1. Service and Recruitment Area**

- a. The Delegate's program operations for service and recruitment includes students living within the Oak Ridge city limits.

**b.** The 2025 Community Assessment reveals a significant need for Head Start services in Oak Ridge. With 1,413 children under age 5 and 24.9% living in poverty, Oak Ridge faces a higher concentration of need compared to Anderson County's overall 18.5% child poverty rate. This need is compounded by limited high-quality childcare options, with only 36% of licensed care in the county meeting high-quality standards.

The assessment also highlights that 70% of children under six have all available parents in the workforce, underscoring the demand for full-day, quality early childhood programs. Oak Ridge's diverse population, with 5% of students having limited English proficiency, calls for culturally responsive and bilingual services. Additionally, the area shows higher rates of children with disabilities and increasing homelessness among students, emphasizing the need for inclusive and comprehensive support services. Further, 18.1% of children in the county face food insecurity, and 39.3% of families report challenges with anxiety or depression, indicating a need for nutrition and mental health support. These factors, combined with the limited childcare facilities in Oak Ridge, demonstrate a clear and pressing need for Head Start services. The program's comprehensive approach is well-positioned to address these critical gaps in early childhood services within the Oak Ridge community.

**c.** The Delegate does not propose any childcare partners at this time.

## **2. Needs of Children and Families**

**a(i).** The community assessment highlights a critical need for Head Start services in Anderson County, including Oak Ridge. Of the 1,413 children under age five, approximately 352 (24.9%) live in poverty. Disparities in poverty rates are evident, with 45.1% of Black children, 28.5% of Hispanic children, and 24.8% of children of multiple

racers affected, compared to 16.8% of non-Hispanic White children. Language diversity is also a concern, as 1.6% of the population aged five and older has limited English proficiency, with 63.1% of this group speaking Spanish, indicating a need for bilingual services. The assessment further identifies 13 families (11%) experiencing homelessness during the 2023-24 program year. Additionally, 19.7% of Head Start children have diagnosed disabilities, surpassing state averages, underscoring the importance of targeted support for these vulnerable populations.

**a(ii).** The community assessment revealed other key data. The child food insecurity rate in Anderson County is 18.1%, slightly higher than Tennessee's average of 17.9%. Disparities exist among racial and ethnic groups, with 20% of Hispanic children and 22% of African American children facing food insecurity. In 2022, 21.9% of children in Anderson County received SNAP benefits, while 1.6% received TANF (Temporary Assistance for Needy Families), highlighting a need for access to supportive public assistance programs.

There is a strong need for community resources such as affordable housing, transportation, mental health services, and affordable dental services, as highlighted by community stakeholders. Of significant note, community stakeholders unanimously identified that "the demand for low-cost safe housing exceeds supply" as one of the top five challenges facing families in poverty in Anderson County. Of renter-occupied households, 38.7% are classified as cost-burdened, spending over 30% of their income on housing. This indicates that many families in rental units are spending a disproportionate share of their income on housing, which limits their ability to invest in childcare, health care, and food.

Anderson County is designated as a Health Professional Shortage Area (HPSA) for dental health among low-income populations. This designation indicates that there are not enough dental providers available to meet the needs of the community, particularly for those who are low-income. This shortage can hinder children's access to necessary dental services. In a Family Survey, 59.8% of respondents indicated that access to affordable dental care was a challenge, with 23.8% stating it was sometimes a challenge and 16.4% stating it was always or often a challenge.

Stakeholders noted that feelings of anxiety and depression are prevalent among families. Specifically, 5.7% of respondents stated that having feelings of anxiety and/or depression is "often or always a challenge," while 33.6% stated it is "sometimes a challenge." Stakeholders have highlighted that access to affordable mental health services is a significant challenge for families in Anderson County. This highlights the difficulties families face in obtaining dental care for their children.

**a(iii)** As of November 2024, there are 8 childcare centers in Oak Ridge with a total of 769 slots for children. However, only 36% of licensed childcare for children under age six is considered high-quality, which is lower than the Tennessee state average of 48%. For every licensed high-quality childcare slot in Anderson County, there are approximately 2.1 children under age six who could benefit from that slot. This ratio indicates a significant gap in available services compared to the number of children needing care.

The Voluntary Pre-K (VPK) initiative serves Tennessee's four-year-old children, emphasizing those at risk. The allocation for Oak Ridge remains at 100 students for the 2024-25 school year. Of the Community Stakeholders surveyed with our Community

Assessment, 83% indicated that access to affordable preschool/childcare is a consistent concern within our service area.

Home visiting services, specifically through the Nurture the Next program, are available to families in Oak Ridge. This program provides weekly home visits to at-risk families, offering direct support and connecting them with necessary resources.

**b.** The program prioritizes equitable access through several strategic initiatives:

- **Community Engagement:** The program collaborates with community organizations, current families, and the Policy Committee to ensure that the selection criteria address the specific needs of Black, Latino, Indigenous, Native American, Asian American, Pacific Islander, and other children of color.
- **Bilingual Resources:** By providing bilingual materials and resources, the program enhances communication with families, empowering them to engage in the selection and eligibility process.
- **Cultural Competence Training:** Program staff undergo training to promote understanding and respect for the diverse heritages of the communities served, fostering culturally responsive programming.
- **Support for Families Experiencing Homelessness:** Program maintains positive relationships with agencies, assisting families experiencing homelessness, prioritizing their enrollment and addressing their unique challenges through comprehensive support.
- **Collaboration for Foster and Kinship Care:** The program works with child welfare agencies to identify and prioritize enrollment for children in foster or kinship care,

providing resources and training to caregivers to promote stability and nurturing environments.

- **Child Find Events:** The program's annual Child Find event allows support staff, including specialists in speech, occupational therapy, and intervention, to evaluate children with developmental concerns. This initiative ensures early identification and prioritization of enrollment for children with disabilities.
- **Support for Dual Language Learners:** To better serve dual language learners, the program employs bilingual staff and offers application materials in multiple languages, ensuring families can access essential information without language barriers. The Policy Committee plays a crucial role in developing selection criteria that prioritize the needs of this group.

### **3. Proposed Program Options and Funded Enrollment Slots**

a. Oak Ridge Schools' Preschool/Head Start program operates a center-based option for children ages 3-5, fully complying with the requirements set forth in 1302 Subpart B of the Head Start Program Performance Standards.

The program provides full-day services. The program operates for at least 6 hours per day, 4 days per week, and for 4 hours on 1 day per week, offering a minimum of 960 annual hours of planned class operations over the course 10 months per year. This schedule not only meets the regulatory requirements but also supports the needs of working families by providing consistent, high-quality early learning experiences for their children.

Compliance with Service Duration is further met through an extension of the day for 53 students (45%) that extends over the school year. These 53 students participate in a

morning program in which physical activity and research-based practices give students a healthy and active start to each day. This opportunity is open to all enrolled Head Start students, with priority placed on those families demonstrating need for an early arrival time.

The program strictly adheres to the ratios and group size requirements. For 4- to 5-year-old children, the program typically maintains a staff-child ratio of less than 1:10 and a maximum group size less than 20. For 3-year-old children, the program maintains a staff-child ratio of at least 1:9 and a maximum group size of 17 or less.

Center-based classrooms are structured to provide nurturing and responsive care, effective teaching practices, and an organized learning environment that promotes children's development. The program achieves this through the implementation of research-based curriculum, qualified teaching staff, and well-equipped classroom spaces.

**b.** The program is not requesting a locally designed option.

**c.** The program offers the center-based program option that is designed to meet the diverse needs of the community's children and families, as identified in recent community assessment. The program serves 118 Head Start slots. All funded slots are center-based with full-day hours, addressing a critical need identified in the community assessment - the lack of quality, affordable care for preschoolers.

The community assessment revealed that 70% of children under age six in Anderson County have all available parents in the labor force, higher than the Tennessee average of 65%. The program's full-day program hours support working families by providing

consistent, high-quality early learning experiences. The program operates from 7:45 AM to 1:45 PM and offers duration hours from 7:15 AM to 7:45 AM.

To address the needs of the diverse population, including the growing number of dual language learners identified in the assessment, the program employs bilingual staff and provides language support services across the program. This ensures children from diverse linguistic backgrounds receive the support they need while maintaining connections with their home languages and cultures.

The program also addresses the high child poverty rate in Oak Ridge (24.9%) by prioritizing enrollment for the most vulnerable populations. This includes children from low-income families, children experiencing homelessness, and children in the foster care system, aligning with the selection criteria and community needs.

The community assessment highlighted a need for increased support for children with disabilities and their families. The program continues to strengthen their partnership with the local early intervention program and the program also serves as the LEA for the school district. During the 2023-24 program year, 19.7% of enrolled children had diagnosed disabilities, higher than state averages.

Recognizing the transportation challenges faced by many families (6.3% of households in Anderson County lack a vehicle), the program collaborates with the local school district to provide transportation services for children in the afternoon. The program works with families that need assistance securing transportation in the morning, ensuring lack of transportation doesn't prevent program participation.

Lastly, the program supports families' overall well-being through comprehensive services, including mental health support with a full-time mental health counselor on site. This is through a partnership with a local mental health agency. The counselor works with the children in the program and their families. This addresses the community assessment finding that 5.7% of surveyed families often or always face challenges with anxiety or depression.

d. No funded enrollment changes are proposed at this time.

#### **4. Centers and Facilities**

a. No deletions, additions, or changes to the current service location.

b. The program has no plans for any minor renovations or repairs.

c. The program does not anticipate any purchase, construction, major renovation, loan or mortgage, and subordination agreement.

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

a. Throughout the school year, the program works diligently to ensure compliance with the Head Start Performance Standards, equipping staff with the knowledge and skills necessary to meet the diverse needs of the families and children in the community. The staff collaborates closely to identify areas within the community to target the population of students in need of services. The program's recruitment process targets five key areas for recruitment: fostering strong relationships with community resource agencies and families, distributing informative flyers (in Spanish and English) throughout the community, engaging in social media outreach, and utilizing word of mouth. These strategies work in tandem to generate potential eligible applicants who meet the greatest need within the service area. Each spring, the program holds a two-week

registration event to encourage families to enroll their children in Head Start for the next school year. The program has participated in the LEA's Trunk or Treat, community resources events and Summer Bash to help maintain a presence in the community and create pathways for the most vulnerable children and families to access the educational opportunities offered.

**a(i)** The community is unique as there are not certain areas where potentially marginalized families live, which makes it more of a challenge to locate and recruit potential students. To enhance outreach efforts, the program focuses on high-traffic locations families may frequent and actively participating in community events families may attend, ensuring that recruitment strategies are both effective and accessible. Transportation remains a challenge for some families, hindering their children's participation in the program. The service area lacks public transportation, which poses difficulties for both eligible and enrolled students. Additionally, third-party transportation options in the area are inconsistent. While the program is unable to offer morning bus transportation, it does provide afternoon bus transportation. Families do have access to a service called East Tennessee Human Resource Agency (ETHRA), which charges \$2 for a one-way trip to the center and \$2 for the return journey home. To address cost concerns, Family Services and the ERSEA Manager collaborate with community organizations to help obtain funding, making ETHRA a viable option for families when needed.

The program currently employs Spanish-speaking Family Advocates, which enhances engagement and recruitment efforts for dual language learners in the community. For the 2023-2024 school year, the program served six Spanish English language learners

and one Russian English language learner. In the current school year (2024-2025), there is a 5.93% increase in language learners. The program currently serves thirteen Spanish English language learners and one Russian English language learner. In 2022, the program's county reported 270 foster children with sixty available foster homes. However, this data does not specify the number of open homes within the program area or how many of these foster children are aged 3 to 5 years old. For the 2023-2024 school year, the program had zero foster students and thirteen homeless or kinship care students. Whereas, for the 2024-2025 school year, the program has seen a 0.85% increase with two foster students and twelve identified as homeless or in kinship care. To ensure the program effectively serves students with disabilities, it collaborates with local physicians and the Tennessee Early Intervention System (TEIS) throughout the year. This collaboration guarantees that students receive necessary services regardless of the time of year or their placement. Additionally, the program hosts an annual Child Find event in the spring. A breakdown for the reported identified race is seen below.

<b>Reported Race for each Student Over Two School Years</b>			
<b>Identified Race</b>	<i>Total number of participants:</i> 127 <b>Year 2023-2024</b>	<i>Total number of participants:</i> 125 <b>Year 2024-2025</b>	<b>Percentage between years</b>
African American	38	30	-5.92%
Hispanic/Latino	23	29	+5.09%
Asian	2	3	+.83%
White	70	68	-1.58%
Native American	1	0	-.79%
Other	0	10	+8%
Multiple	31	21	-7.61%

By sustaining ongoing collaboration and community engagement, the program is invested in addressing the recruitment challenges faced by marginalized students, ensuring that it effectively reaches and enrolls preschoolers in the community who might otherwise be missed.

**b.** Promoting regular attendance is a critical factor in supporting educational success in students. To achieve this, the program employs a multifaceted strategy that includes established policies and procedures, active family engagement involving teachers and family advocates, and targeted outreach by the ERSEA Manager. For children who exhibit chronic absenteeism, the ERSEA Manager takes proactive measures to contact families and discuss attendance concerns. This outreach includes the LEA's communication platform, personalized phone calls, letters, home visits, and face to face interaction within the center. These procedures enable the program to better understand the individual circumstances affecting attendance. Through these conversations, the program explores potential solutions and connects families with community resources that can help assist in their challenges. The program tailor's communication and support efforts to meet the unique needs of families from historically marginalized backgrounds, ensuring that outreach is respectful and inclusive. Recognizing the importance of cultural sensitivity in the approach, the program continually works to enhance its ability to connect with families who may be hesitant to engage with staff due to past experiences or systemic barriers.

## **6. Education and Child Development**

**a.** Center-based programs:

**a(i).** Oak Ridge Schools' Preschool/Head Start provides high-quality early education through the Creative Curriculum for Preschool. This comprehensive approach is built on five fundamental principles that guide the program setup and daily operations. These principles emphasize the importance of positive adult-child interactions, social-emotional competence, purposeful play, the impact of the physical environment on learning, and the crucial role of teacher-family partnerships in promoting child development and learning.

To enhance early literacy efforts, the program has integrated the Tennessee Foundational Skills Curriculum Supplement to establish a robust foundation for literacy skills. Additionally, it employs Conscious Discipline as a supportive framework, offering strategies for social-emotional development and positive behavior management. This combination creates a nurturing environment that fosters crucial life skills in young learners.

**a(ii).** The Creative Curriculum is tailored to meet the diverse needs of 3–5-year-old students, including those from various cultural backgrounds and ability levels. It's designed to capitalize on children's natural curiosity, fostering exploration and discovery. The curriculum's strong research foundation incorporates best practices validated by peer-reviewed studies, ensuring methods align with the latest understanding of early childhood development. At its core, the curriculum features a well-organized developmental scope and sequence. Built around Objectives for Development & Learning, it provides a clear roadmap for skill acquisition throughout the year. The curriculum's structure, centered on Studies, allows for deep exploration of engaging topics while developing skills across all developmental domains. Intentional

Teaching Cards with color-coded sequences enable teachers to effectively scaffold experiences, ensuring every child can participate successfully regardless of their individual abilities or background. This culturally responsive approach ensures that every child sees their experiences and heritage valued in the classroom, promoting a sense of belonging and enhancing engagement in learning activities.

**a(iii).** Alignment with Head Start Early Learning Outcomes Framework:

The program's choice of the Creative Curriculum demonstrates its commitment to aligning with the Head Start Early Learning Outcomes Framework. This alignment is evident throughout the curriculum, from its core Objectives for Development & Learning to the individual studies children engage in throughout the year. Daily resources such as Mighty Minutes, Intentional Teaching Cards, and Book Discussion Cards are carefully designed to support specific framework domains and indicators. To aid in implementation, Teaching Strategies provides a comprehensive alignment document, offering a clear mapping of how the curriculum addresses each area of the Framework. To support educators and administrators in understanding and implementing this alignment, Teaching Strategies has produced a detailed alignment document. This resource provides a clear mapping of how the *Creative Curriculum for Preschool* addresses each area of the Head Start Early Learning Outcomes Framework.

**a(iv).** The program is committed to supporting staff in implementing the Creative Curriculum with fidelity through an ongoing approach. At the core of the program's strategy is the utilization of the curriculum's own fidelity tool during regular Professional Learning Communities (PLCs), ongoing professional development, and staff meetings.

This practice allows educators to assess and reflect on their implementation of the curriculum.

To further support educators, the program has a dedicated Curriculum Coach who works closely with teachers on an individual and group basis. The coach uses the Administrator Fidelity Checklist as a guide for discussion during intensive coaching cycles to provide feedback and support. This one-on-one coaching ensures that each teacher receives tailored guidance to enhance their skills in delivering the curriculum effectively.

The program provides ongoing professional development opportunities focused specifically on the *Creative Curriculum*. These training sessions, which occur throughout the year, keep staff members updated on the latest research and best practices in curriculum implementation. A peer mentoring system and open feedback loop further ensure consistent, high-quality implementation across all classrooms. The program also provides all necessary curriculum materials, empowering educators to fully leverage the curriculum's resources.

**b.** The program does not offer home-based programs.

**c.** The program employs a comprehensive approach to developmental screenings and assessments, carefully selected to accurately capture each child's progress and needs, including those who are dual language learners. It utilizes the Brigance Screening Instrument for initial developmental screenings, valuing its ability to quickly and accurately identify potential developmental delays across multiple domains. The Brigance's validity across diverse populations and availability in multiple languages

make it particularly suitable for the diverse student body, including dual language learners.

To evaluate children's social and emotional development, the program employs the e-DECA (Devereux Early Childhood Assessment). This tool is crucial for its focus on resilience in young children and its capacity to identify both strengths and areas for growth in social-emotional competence. The e-DECA's availability in Spanish further supports assessment of dual language learners.

For ongoing assessment, the program relies on Teaching Strategies GOLD (TSG). This comprehensive, observation-based assessment system aligns seamlessly with *Creative Curriculum* and covers all areas of development and learning. TSG's ability to track children's progress over time, provide individualized learning plans, support differentiated instruction, and offer a user-friendly online platform for documentation and reporting makes it an invaluable tool for educators. For dual language learners, TSG is particularly beneficial as it includes specific objectives for English language acquisition, allows for assessment in the child's home language, and provides resources and strategies for supporting dual language development.

**d.** Oak Ridge Schools' Preschool/Head Start, recognizes that parents and family members are crucial partners in their child's education. The program offers numerous opportunities for families to be actively engaged in their child's learning journey, from the initial enrollment process through ongoing assessments and curriculum implementation. Engagement begins with an initial home visit, where teachers take time to know the family in their own environment, establishing a warm, trusting relationship. During this visit, staff encourages families to set educational goals for their child. Throughout the

year, the program holds additional parent conferences and an additional home visit to discuss outcomes and progress, using TSG's Family Conference Form to guide these discussions. Throughout the year, the program share progress reports and invites parents to contribute their observations. The program actively involves families in the curriculum through Family Learning Games and "Letters to Families," which provide activities and information about classroom learning. The program encourages parents to volunteer as "expert" speakers, enriching the curriculum with diverse perspectives. The Policy Committee, which includes parents and community partners, plays a vital role in reviewing and providing input on various aspects of the program, ensuring parent voices are heard in the decision-making processes.

**e.** The program does not serve AIAN children at this time.

## **7. Health**

**a.** Oak Ridge Schools' Preschool/Head Start is committed to meeting the comprehensive health needs of all children in the program, ensuring that each child grows up healthy, safe, and ready for success in school and life. The program's approach is holistic, addressing oral health, nutrition, mental health, social and emotional well-being, and overall health status in ways that are developmentally, culturally, and linguistically appropriate for the diverse community.

The program prioritizes oral health by collaborating with local dental professionals to provide screenings and educational sessions for both children and families. Throughout the year, the program incorporates oral health education into the curriculum, teaching children about proper brushing techniques, the importance of regular dental check-ups, and healthy eating habits that support strong teeth and gums.

The nutritional program, supported by the Child and Adult Care Food Program (CACFP) Grant, ensures that all meals and snacks served meet or exceed nutritional requirements. The program shares menus with families as models for healthy nutritional choices at home and provides information on accessing resources such as SNAP, Food for Kids, Community Meals, and Community Food Banks. The program's partnership with UT Extension has brought nutritional lessons into classrooms often with take-home components to reinforce the connection between school and home nutrition practices. Recognizing the importance of mental health and social-emotional development, the program partners with a local mental health agency to provide comprehensive support. This includes regular classroom observations by mental health professionals, individual child consultations, and targeted support for families facing challenges. The program has a full-time contracted mental health therapist on site who provides services to children at school and works closely with families.

The program conducts comprehensive health screenings and assessments, covering vision, hearing, developmental milestones, and overall physical health. The health manager and family service staff work closely with parents to understand each child's current health status and assist families in finding appropriate providers and accessing necessary care when needed.

To ensure health services are accessible and relevant to all families, bilingual family advocates are available to facilitate partnerships with families who do not speak English as their first language.

**a(i).** The program utilizes a monitoring system, Child Plus management system, to track all screenings, assessments, and referrals. This system allows it to ensure that all

health-related activities are performed within the required timeframes and that each child receives accurate referrals for any necessary follow-up evaluations or treatments. The program's commitment to children's health extends beyond initial screenings; the program maintains ongoing communication with parents throughout their child's enrollment. This continuous dialogue helps parents keep their children up to date on health requirements, ensuring they're fully prepared for kindergarten enrollment. When families face challenges in accessing medical or dental services, staff provides assistance, offering information on area physicians and dentists, and helping to establish medical and dental homes for each child.

**a(ii).** At the core of the program's efforts in providing mental health services is a full-time contracted mental health counselor, provided through a partnership with a local mental health agency. This counselor works directly with children, families, and staff, offering immediate support and ongoing consultation as needed.

The program's partnership with the local mental health agency provides comprehensive services, including classroom observations by professional consultants who offer tailored feedback to staff. For children with potential social or emotional concerns, the program obtains family permission for individual observations. It then facilitates collaborative meetings with mental health professionals, families, and teachers to develop personalized supportive strategies.

The program prioritizes family engagement throughout the consultation process, from obtaining permissions to strategy development. The partner agency provides extended support and resources for families. By combining in-house expertise, agency partnerships, evidence-based practices, and strong family involvement, the program

has created a comprehensive mental health consultation service. This approach addresses diverse social-emotional needs, promoting positive outcomes for all children in the program.

**b.** The Program Director conducts the comprehensive health and safety environments screening within the first 45 days of the school year, adhering to Head Start standards. The program exceeds requirements by conducting an additional voluntary screening during Spring Break, ensuring a consistently safe environment and addressing any emerging concerns promptly.

**b(i)** The screening is completed within the first 45 days of the school year.

**b(ii)** If children were to begin receiving services in a new environment, that environment would be screened prior to children being present.

**b(iii)** If a new project began during a school year, that environment would be screened prior to children being present.

## **8. Family and Community Engagement**

**a.** Creating trustful and respectful relationships with families requires intentionality and a commitment to cultural and linguistic inclusivity. The program prioritizes open, engaging, and respectful communication from the first contact with families, ensuring that all voices are heard, including those of fathers and male guardians.

The family services and front desk staff are trained in effective communication practices, emphasizing the importance of using welcoming language that resonates with diverse cultural backgrounds.

To better understand the unique needs of families, the program surveys parents to gather insights into their preferences for communication. It encourages methods such

as phone calls, texts via the school platform, emails, and face-to-face visits, allowing families to choose the most comfortable way to connect.

In effort to foster a welcoming environment, staff members learn the names of all students and greet them each day using their preferred names. This practice not only builds rapport but also respects each student's identity, creating a sense of belonging. Family advocates speak Spanish to assist parents and students. For other languages, free translation services are available through the LEA. Parents can select their preferred language for texts and group posts on the school communication platform. Decor and flyers are designed to reflect the diversity of the ethnic and racial populations in the community. Small parent orientations and an Open House at the start of the school year welcome and inform all families.

**b.** Throughout the year, the program provides diverse family engagement opportunities. During enrollment, it seeks feedback from families as to which activities are preferred and invites new ideas. Events that strengthen the parent, child, and school relationship include participation in Policy Committee, the Family Picnic, Grandparent Breakfast, Father and Friends Event, At Home Reading Challenges, and STEM Night. Staff-led activities at each event focus on age-appropriate literacy, math, and creative skills that families can replicate at home. Opportunities for parents to connect with each other include weekly Mornings and Mugs, Walk and Talks, Galentines Celebration, and Father Playground Nights. Additionally, the program offers skill development and informational sessions such as a Community Resource Fair, Nutrition/Cooking classes, budgeting and credit repair classes, CPR/First Aid classes, and parenting classes.

**c.** Over the past three years, the program has implemented staff training in the Conscious Discipline Curriculum, an evidence-based, trauma-informed approach that fosters self-regulation and builds a compassionate school community. This model emphasizes skills such as self-control, internal motivation, and service to others. Parents have expressed enthusiasm about the positive outcomes they have experienced with their children and have inquired about the language and practices used. In response, the program will introduce the Conscious Discipline Parent Training program to enhance consistency in language and practices at both school and home. Monthly parent trainings will be offered, incorporating session feedback to support continuous improvement and increase parental engagement and satisfaction. This curriculum is also available to be presented in Spanish.

**d(i).** Upon acceptance in the program, family services staff promptly contact families to schedule an in-person meeting. During this meeting, families complete a Parent Survey, providing valuable insights into their interests and preferred times for activities. The program also emphasizes its intent to engage fathers and father figures and collect their contact information at this initial meeting.

Family Services Staff and families then complete a family partnership agreement. This agreement outlines both the program's responsibilities for the child's and family's well-being, including providing a safe and respectful environment, and the family's responsibilities, including attendance and communication expectations. Family services staff then gather assessment information, asking parents to rate their perceptions of their family's strengths and needs across various areas. The parent describes each

area, ex: housing, and then staff uses a five-point rating scale to assign a value to the parent's response. These values are listed as Family Outcomes. The areas are:

- Family Well-Being: housing, safety, adult health, mental health/substance abuse, transportation, financial security, and food and clothing.
- Positive Parent-Child Relationships: nurturing relationships and parenting skills.
- Family as Lifelong Educators: school readiness and promoting the primary language.
- Families and Learners: education, training, and life goals.
- Family Engagement in Transitions.
- Family Connections to Peers and Community.
- Family as Advocates and Leaders.

These domains align with the Parent, Family, and Community Engagement (PFCE) Framework. This information helps guide program decisions as well as individual family goals. Families are informed that their assigned advocate will meet with them at the beginning of the school year to develop a family goal(s). The family is given examples of goals and asked to think about their own possible goal prior to the planning meeting with the assigned advocate.

**d(ii).** The Family Outcomes are entered into Child Plus at the beginning and end of the school year and updated at any other times of significant change. Child Plus reports indicate progress or regressions in Family Outcomes and this data informs what service, resources, and programs are needed. Once the goal is established with the family, the family advocate enters updates and resources into Child Plus. Family

Advocates are expected to contact individual families at least once a month and provide quarterly goal updates in Child Plus. Families can reach out to their advocates at any time regarding their goals or needed resources.

**e.** Community partnerships are essential for addressing the diverse and complex challenges faced by families. Family Services staff actively share and seek new resources, attending monthly community resource meetings for updates on new or expanding community programs that specifically serve families.

The Program has a collaborative partnership with Legal Aid, offering legal assistance to families without having to navigate that program's waitlist. The program has a Memorandum of Agreement with a local Mental Health Center to provide free therapy for children regardless of insurance status. The program has a collaborative grant with GROW Oak Ridge to provide training and supplies for gardening at school and for parents.

The Program works with Aid to Distressed Families of Appalachian Counties (ADFAC), United Way, the Family Resource Center, and various churches to provide support for rent, food, and utilities. The Program's partnership with Helping Mamas supplies free diapers, clothing, and hygiene items to families in need. The program closely collaborates with the Oak Ridge Housing Authority and TORCH (Tennessee Outreach for Homeless) regarding housing needs, as well as the Family Justice Center and the YWCA for domestic violence services. Second Harvest and a local church provide weekend food bags and fresh fruit to families as well as food pantries and community meals. The University of Tennessee Extension Center offers resources and training in

nutrition and budgeting, while the East Tennessee Human Resource Agency (ETHRA) provides job placement and transportation assistance.

The proceeding agencies are just some examples of community partners. These agencies form a robust network of community support, with advocates offering encouragement and guidance in accessing these valuable resources. Challenges to families accessing available resources could include lack of transportation, language barriers, and resistance to accepting help. Family advocates will work to provide transportation to resources, interpretation, and build relationships that encourage openness to intervention.

## **9. Services for Children with Disabilities**

a. The program, as part of the school system, serves as the local agency responsible for implementing the Individuals with Disabilities Education Act (IDEA), ensuring full participation of all enrolled children, including those with disabilities. It offers comprehensive on-site therapy services, including Occupational, Physical, and Speech and Language Therapy, as well as Resource and Inclusion support. The inclusive approach integrates all children, regardless of abilities, into every classroom, fostering a diverse learning environment. To support this model, classroom teachers are assisted in modifying schedules and activities to ensure successful experiences for children with disabilities. Additionally, Individual Learning Plans (ILPs) are created for children who are in the evaluation process as well as for those who did not qualify for special education services. Teachers differentiate their lesson plans based on both IEPs and ILPs, which help ensure full participation for all children. The effectiveness of this

approach is evident in recent data: in the 2024-2025 school year, 28% of the 118 Head Start children received special education services.

**b.** Each child with an Individualized Education Plan (IEP) is assigned to a case manager who oversees its implementation, working closely with classroom teachers to monitor and evaluate progress towards goals. The case manager diligently monitors the provision of services to ensure compliance with IEP-mandated service hours. Parent involvement is prioritized through weekly progress summaries from related services and quarterly progress reports on IEP goals. Parents or program staff can request IEP meetings at any time, allowing for collaborative modifications as needed. To facilitate smooth transitions, the program partners with the Tennessee Early Intervention System (TEIS) to support students moving from Individualized Family Service Plans (IFSPs) to IEPs in the program. As the LEA responsible for implementing IDEA, the program ensures that students receive services based on identified needs from evaluations and IEP goals.

## **10. Transition**

**a.** The program implements comprehensive strategies to support successful transitions from Early Head Start to Head Start. The delegate and grantee agencies collaborate closely to provide seamless transition services for families. Visitation days are organized at the Oak Ridge Schools' Preschool/Head Start, allowing families to familiarize themselves with the new environment and have their first interaction with staff. The team assists families in completing all necessary enrollment documents, with staff readily available to provide support. The ERSEA Manager meets with families to review documents and ensure complete enrollment. The program facilitates information sharing

between Early Head Start and Head Start teachers to maintain continuity of care and conduct transition meetings with families to discuss their child's progress and goals for Head Start. These in-person interactions are crucial in keeping families at ease throughout the transition process.

**b.** The program collaborates closely with the district's four elementary schools, conducting kindergarten transition visits to familiarize children with their receiving schools. Additionally, the program coordinates field trips for children to tour the specific school they are zoned for. Program staff accompany these children to their zoned schools and encourage families to join the tour, which is led by each school's administration. These tours include observing a kindergarten classroom in action as well as exploring other parts of the school. To facilitate a seamless academic transition, all Head Start teachers complete a transition form for each child, providing the incoming school with valuable information on individual learning styles and academic levels. Each elementary school also hosts a Parent Night, offering families information about the transition process and curriculum. Parents receive summer support materials to help prepare their children for kindergarten. To facilitate appropriate placement and support, incoming kindergarten students undergo screening at their respective elementary schools. To ensure continuity of services, the program director meets with each elementary school principal to share information about transitioning families.

**c.** The program supports families transitioning between programs through early identification and collaborative planning. It prepares up-to-date documents, assists in researching new Head Start programs, and, with family consent, communicates directly

with receiving programs. The program promptly transfers all relevant records to ensure continuity of services and support.

## **11. Services to Pregnant Women**

The delegate does not provide services to Pregnant Women.

## **12. Transportation**

a. Transportation is a critical factor in ensuring access to the Head Start program for families in Oak Ridge. The Community Assessment data reveals that 6.3% of households in Anderson County lack access to a vehicle, highlighting a need for transportation services. While Oak Ridge does have a public transit system (ETHRA) available to citizens, the associated costs can be prohibitive for many families.

Alternative options such as ride-sharing services like Uber and Lyft, as well as local taxi services, are available but may not be feasible or affordable for all families.

b. To address these transportation challenges, the program has implemented a collaborative solution. It partners with Oak Ridge Schools, the Local Education Agency (LEA), to provide afternoon transportation for students from the program site to their homes through a contracted provider. This service not only ensures children can safely return home but also serves as a portion of the non-federal share collected by the program. For morning transportation, parents are responsible for bringing their children to the program. However, the program recognizes that this arrangement may pose difficulties for some families. In such cases, it provides information about public transportation options to assist families in accessing alternative means of transportation.

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

### **1. Governance- Delegate**

## **Structure**

- a. The program's governing body is Anderson County School Board of Education who delegates responsibility of 118 Head Start children to Oak Ridge Schools' Board of Education. *See Subsection C; 1a of the Recipient's Application.*
- b. The governing body is represented by three Anderson County Board of Education members elected by Oak Ridge Citizens.
- c. The program currently offers only center-based programming at one site. The Policy Committee is composed of parents and community partners. Parents are elected to serve on the Policy Committee by other parents. The Policy Committee also includes community partners that have a direct impact on families within the community. These partners offer various programs and services directly to families in poverty.

## **Processes**

### ***Governing Body***

- a. The governing body of the program receives key program information in several ways. The school board chair appoints a school board member to be the representative between the school board and the program. This school board member attends the monthly Policy Committee meetings to gain knowledge of Policy Committee decisions that are made that will be sent to the Governing Body for approval: Every item sent to Anderson County governing board must also be approved by the Oak Ridge Schools Board of Education. They ensure the "Conduct of Responsibilities" of the school board by presenting items to the school board, such as, the annual self-assessment and findings, community assessments and updates, and school readiness data. The program information report includes monthly updates from each service area at the

monthly meetings. These reports are sent to members via email prior to the meetings. Elected Policy Committee members make the required votes at the time of the meeting. The financial audit is the responsibility of the Business Office Supervisor. The supervisor reports the findings annually to the school board as well as address any findings, if necessary.

The governing body of Anderson County approves annual and monthly budgets.

**b.** Nothing is assigned to Advisory Committee.

### ***Policy Council and Policy Committee***

**c.** The governing body and policy committee receive monthly reports with updates on content areas, attendance, meal counts, budgets, etc. from the grantee and delegate.

The governing body and policy committee are responsible for the community assessment, self-assessment, annual audit, funding application, operating budgets and any other items requiring approval according to the performance standards and Head Start Act. The program updates the Program's Timeline annually to ensure reports and items for approval are submitted as required.

### ***Parent Committees***

**d.** The Parent Committee has a representative attending the policy committee meetings to provide a report. There is open communication between the Parent Committee and staff. Parents participate on school committees such as an Event Planning Committee to actively guide decision and ensure the needs of current families are met.

**e.** The Policy Committee representative attends monthly Policy Council Meetings. This representative reports back to the Policy Committee as needed.

### **Relationships**

a. Elected Policy Committee members are trained by using information from ECKLC, Roberts Rules of order and brochure for effective Head Start meetings. The Family Services Manager provides guidance on Code of Conduct, Confidentiality Agreement and the ERSEA Manager provides ERSEA training. The bookkeeper provides an overview of the budget. At each meeting, members are asked if they have any questions on items presented before a vote is requested.

b. Members of the Policy Committee are required to sign confidentiality and Standards of Conduct forms. There are also policies and procedures in place to ensure that members follow all requirements. The Policy Committee By-Laws are very clear as to the requirements and conflicts of interest. This information is reviewed and voted on at the meetings. If at any time there is a concern that this has been violated by a member, removal will be reviewed.

c. A representative from the Oak Ridge Schools Board of Education is assigned to Policy Committee. This representative serves as a liaison and shares information regarding decision making between the two entities. *See Sub-Section C; Relationships (c) of the Recipient's Application.*

## **2. Human Resource Management**

a. The program has an organizational structure that identifies the management and staffing structure of the programs. A copy of the organizational chart is uploaded under the supporting documents.

b. As part of the Oak Ridge Schools, pay scales and benefit packages are determined by the school district. The pay scale is revisited by the district leadership and Board of Education each year to ensure a competitive wage for all staff and to maintain a high-

quality staff by guaranteeing a pay scale that is comparable to or greater than other local school districts. The district's salary schedules include scheduled increases over staff members' years of service. Each year of service earns an additional step on the salary schedule, which provides for a step increase in salary. In addition to the step increase each year, an additional Cost of Living increase is negotiated and voted upon by the district's Board of Education. To continue efforts to recruit highest quality staff, and to increase the living wage for the hourly employees, a 10% Cost of Living increase in salary scale was designated for teaching assistants throughout the school district for the 2024-2025 school year.

c. Procedures are in place to ensure that all employees, including consultants and contracted employees of Oak Ridge Schools' Preschool/Head Start, receive criminal background checks, prior to the beginning of employment. The program is fortunate to operate under the auspices of the Oak Ridge City Schools' Human Resources Department, which helps to ensure that background checks have been completed before an employee can begin working with or around children. The Oak Ridge Schools has adopted the policy of updating criminal background checks every 5 years for all employees. This includes principals and other non-Head Start staff that are around children. Once background check results are received, if there is an indication that the applicant has a charge against them that might preclude them from employment, the Oak Ridge Schools' Preschool/Head Start Human Resource Department investigates the charge through the schools' legal department. Once a determination has been made the Head Start program is notified whether the applicant is eligible for hire. The person is not allowed to begin work until they have been cleared.

**d.** New employees receive an orientation within two weeks of their start date, beginning with a meeting at Oak Ridge Schools' Human Resources to complete their benefit package and obtain a photo ID badge. On their first day, they sign the Employee Code of Conduct and meet with the program director to complete paperwork, review policies, and receive their job description. Employees then complete all required Head Start, State, and program-specific safety trainings. They are introduced to management staff, given a contact list and organizational chart, and provided with the program's philosophy, goals, and implementation procedures. Similarly, volunteers undergo a tailored orientation process, including relevant safety trainings and an overview of program policies, ensuring they are well-prepared to support children and staff effectively.

**e.** The program's approach to staff training and professional development is to provide group and individualized training. All staff create an individual Professional Development Plan to ensure staff are provided opportunities to increase their knowledge and improve upon teaching practice. Support is given to all staff throughout the school year during staff meetings, Professional Learning Communities (PLC), systemwide training, and one-on-one support as needed.

The program implements the research-based Practice Based Coaching Model (PBC) to provide intensive coaching to identified staff. Staff are selected for intensive coaching through the analyzing of data collected through teacher evaluations, a needs assessment, CLASS, or by request. Those staff receiving intensive coaching, following PBC, develop action plans based on the teaching practice identified to strengthen,

receive a focused observation, reflect on the teaching practice implemented, and receive feedback to begin the cycle again.

To develop a trusting and collaborative partnership with coachees, coaches spend time getting to know each coachee through questionnaires, conversations, and spending time in the classroom.

Coaches and coachees determine a timeline for the steps to be completed, after which a Focused Observation takes place. This observation provides the coach with information as to how the coachee is progressing.

Coaches meet with coachees for Reflection and Feedback to go over the Focused Observation, provide support and encouragement to the coachee, and determine through conversation and looking at the data, whether the coachee has completed the Action plan and is ready to move on to another teaching practice, or perhaps adjust the current Action Plan to address the teaching practice in a different way.

Staff who are not chosen for intensive coaching still receive professional development opportunities based on their Needs Assessment in the form of Professional Learning Communities (PLC) and appropriate training.

In addition, teachers who are new to the program meet monthly with the Curriculum Coach. This provides an opportunity to support new teachers with the implementation of curriculum, data collection, classroom pedagogy, or to answer general procedural questions.

### **3. Program Management and Quality Improvement**

**a.** The program utilizes various methods to collect data and feedback to measure progress, identify program strengths, and continuously evaluate areas of need. One

tool, the curriculum fidelity checklist, allows the program to measure the degree to which the teachers are implementing the curriculum to drive instruction and to enhance family engagement. Data is collected throughout the year and reports are created by Child Plus to help the program measure and facilitate family volunteers and monitor chronic absenteeism.

The monitoring of the educational goals and services is accomplished by analyzing data from Teaching Strategies Gold three times per year (Fall, Winter, and Spring checkpoints). Classroom data is analyzed and discussed at weekly Professional Learning Communities (PLC). This information is collected and reviewed for continuous monitoring of student learning. Feedback from teacher training and coaching sessions also drives program decisions and future professional development. Classroom data is also used to drive classroom instruction and support effective teaching practices by allowing teachers to scaffold learning.

To promote staff retention, staff are encouraged to participate in annual surveys that provide the opportunity to identify strengths and areas for improvement related to school leadership, school culture, and policies and procedures.

Family needs assessments and family surveys assist the program in collecting needed data from the families. This data drives yearly programming decisions based on current family needs.

The program ensures that the children are safe at all times by promoting effective health and safety practices. This is accomplished by a daily and monthly playground and environmental safety checklist, daily and monthly classroom health and safety checklist,

oversight of maintenance needs by Oak Ridge Schools' Maintenance department, and ongoing safety monitoring by an onsite Health and Safety Manager.

**b.** The program uses several tools to ensure continuous program improvement and the effective use of data for ongoing monitoring to provide individual professional development. The Classroom Assessment Scoring System (CLASS) is used to measure the quality of interactions between teachers and students. Teachers are provided with feedback from the use of the CLASS instrument through one-on-one reflection meetings with the CLASS observer. Curriculum Fidelity checklists are used to ensure that children are provided with a developmentally appropriate curriculum by measuring the degree to which each teacher is fully implementing the chosen curriculum. Tennessee Educator Acceleration Model (TEAM) Evaluations are used to ensure quality teaching services are provided and give teachers an area to improve. The teacher, in collaboration with the evaluator, decides on the domain in the rubric that would best serve the children. Resources to strengthen the teacher's craft are provided. Teaching Strategies Gold Assessment (TSG) is used to systemically collect and analyze data to drive instruction and provide professional development. The program also uses the CLASS Environment Assessment tool to assess the early learning environment in the areas of cognition, social-emotional, and physical development as well as health and safety standards. The program employs a curriculum coach, who utilizes the model of Practice Based Coaching to support professional development for staff members.

Holding staff to a high standard and providing multiple means of support for their growth in teaching practices is an effective means of promoting staff retention. The program

has a Guiding Coalition/Leadership Team that meets on a regular basis to provide all staff with the opportunity to actively participate in the planning and assessment of progress towards program goals.

c. Within the current budget, staffing is sufficient to maintain the required adult-to-student ratio. To promote continuity of care, an additional support assistant is provided for the classrooms of 3-year-old students as well as classrooms with a higher number of students with disabilities. The program also staffs two “floater” teaching assistants. These additional staff members serve as substitutes in the absence of the teachers or teaching assistants to provide continuity of care.

The school calendar is created each year to provide adequate time for training and professional development. At the beginning of each school year at least 3 days are used for staff professional development. Other professional development days are aligned throughout the school year to provide training based on data that is gathered throughout the year. Teachers’ schedules have daily planning times built in. This time can be utilized for individual training with educational management staff for coaching or reflecting from observations. When staff attend off campus professional training, the program provides substitutes for continuity in the classroom. All the program’s teachers participate in Professional Learning Communities (PLC) on a weekly basis where they collaborate with their peers on analyzing data and work on refining implementation of the curriculum. Besides the weekly PLC, teachers also participate in a System-wide Professional Development one Wednesday per month for 2 hours. These training sessions align with the school district and focus on topics such as the use of data to drive instruction, meeting the needs of students with special needs, and setting SMART

goals, to name a few. The Education department uses data to provide teachers with support on providing the full range of services needed to successfully run the program.

d. No current findings/issues.

## **Section II. Budget and Budget Justification Narrative**

1. The delegate, in submission of this application, is requesting \$1,065,718 for the basic grant and \$9,317 for T&TA, totaling \$1,075,035. The total funded enrollment is 118.

**a.- b. Salaries & Fringe Benefits-** Oak Ridge Schools' Preschool/Head Start personnel are paid on the Oak Ridge School District's pay scale. These costs run high because employees receive step increases and any COLA approved by the board of education or mandated by the state. A step increase (an added year of experience) is added to classified personnel salaries each year up to 13 years of service and certified personnel receive step increases each year up to 15 years of service with an additional step increase at 20 years of service. A benefit package that includes health, dental, vision and life insurance is provided as an option for all full-time employees. Full-time employees also receive Tennessee Consolidated Retirement System membership. All school district employees receive paid personal leave, paid sick leave, and can invest in tax-deferred annuities and cafeteria plans for medical and childcare needs. There is no information regarding a change in medical insurance costs, nor is there currently information regarding a change in the cost of life, vision or dental insurance. At this time, there is no available information on whether there will be an increase to the closed pension plan contribution rate for certified personnel, the hybrid retirement plan or the rate for classified personnel participating in TCRS, so those amounts have remained the same.

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

**d. Equipment-** At this time the program has no plans to purchase equipment.

**e. Supplies-** Funds will also be used to purchase supplies. Supplies necessary for administering the program include office, instructional, and miscellaneous supplies that allow the program to adhere to program performance standards and state licensing requirements. The program supplies toothbrushes and toothpaste for each child to use in their classroom. The program also purchases gloves for the staff to wear when performing hygiene activities with the children, as well as for situations that warrant a personal protection barrier. Other supplies such as diapers, baby wipes, facial tissue, first aid supplies etc. are purchased as needed, but the program strives to utilize community partnerships to fulfill those needs whenever possible. If a child with a disability has a special need for materials in the classroom, those materials are supplied as well. Classroom instructional supplies include, but are not limited to, crayons, construction paper, glue, manipulative materials, evaluating tools, and any other

supplies needed to maintain an educationally appropriate learning environment for the Head Start children. The better the classrooms are supplied with age-appropriate materials for the children and proper teaching materials for the staff, the better equipped both parties will be to attain school readiness goals. Having the necessary supplies and support to carry out program goals is critical.

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

serves all children breakfast, lunch, and snacks (no snack on Wednesdays due to short days) with funds received through a CACFP grant. In addition, contractual dollars are used for Head Start dues, student database software, educational software, and bus transportation for field trips.

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

**h. Other-** The program budgets for parent activities throughout the year to offer opportunities for socialization with other parents of young children, as well as educational trainings that increase parents' knowledge of school readiness and that meet required trainings. Family engagement activities are scheduled throughout the year that include the whole family and separate activities are offered that provide fathers an opportunity to actively participate in their child's learning experience. In addition, parents and children are afforded extra-curricular activities. Many of these activities have incidental expenses. Monies are set aside to enhance the children's learning experiences by offering field trips outside the classroom. Also included in this category of the budget are expenses that are incurred on a regular basis such as funds for staff to make home visits, maintenance for office equipment, playground equipment and vehicles, and for copying and postage charges.

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

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

## **2. Personnel**

Oak Ridge Schools' Preschool/Head Start hires teachers certified in early childhood education in accordance with Oak Ridge School District policies. This provides the program with teachers who are highly qualified in early education and are experts in working with children to achieve the school readiness goals. The salary schedule for school employees is revised each year by the Board of Education to ensure that a competitive wage is maintained to promote staff retention and to improve racial and ethnic disparities.

When calculating the FY25 budget the following factors were considered:

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

### **3. COLA**

At this point, the program has not been instructed to request any COLA funds.

### **4. Training and Technical Assistance (T/TA)**

Training and Technical Assistance funds are utilized to support the training and technical assistance for the staff and families to support the program's goals. Funds budgeted for Staff Development (including travel) provide opportunities for on-site training with consultants, such as Conscious Discipline training consultants or for virtual training such as Child Plus virtual workshops. These funds also provide an opportunity for staff to attend off-site training events and conferences such as Head Start Region IV Conference, THSA training, or Head Start Leadership Forums. In addition, funds budgeted as Contracted Services provide funds to support the mental health of staff, families, and students through training with a contracted mental health consultant.

## **5. Non-Federal Resources**

The 20% non-Federal share match, for a total of \$268,759, is accomplished through:

- A portion of the salaries and benefits of five Head Start teachers and one teaching assistant who are paid out of state and/or local funds. Each of these teachers' classrooms are blended classrooms with Head Start students, VPK students, and Title 1 students. The total of these salaries and benefits equals \$243,147.
- Bus transportation services for Head Start students provided by the School District (LEA)

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

Each year at least 80 students utilize the one-way transportation. Students attend 174 days each year. This breaks down to an approximate cost of \$1.84 per child per day for this service. The total used for Non-Federal share is \$25,612.

## **6. Non-Federal Share Waiver**

The program is not proposing a waiver of the non-federal share.

## **7. Administrative Cost Waiver**

The program is not proposing a waiver of the 15% limitation on development and administrative costs.

## **8. Enrollment Reduction or Conversion**

The program is not requesting an enrollment reduction or conversion.

## **9. Purchase, Construction, or Major Renovation**

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

#### **10. Equipment**

The program is not requesting funds for equipment.

**GRANT STAFF:**

<u>Position</u>	<u>Annual Salary</u>	<u>OHDS Share</u>	<u>USDA</u>	<u>% Time</u>	<u>Hours</u>
			<u>Share</u>	<u>OHDS Grant</u>	
<u>Director</u>	\$125,175	\$56,328	0	45%	940
<u>Ed Coordinator</u>	\$90,032	\$67,524	0	75%	1,271
<u>Bookkeeper</u>	\$50,582	\$25,291	0	50%	1,044
<u>ERSEA/Compliance</u>					
<u>Manager</u>	\$43,793	\$32,845	0	75%	1356
<u>Family/Community</u>					
<u>Svc. Manager</u>	\$54,108	\$32,465	0	60%	1,085
<u>Secretary</u>	\$47,153	\$23,576	0	50%	1,044
<u>Family Advocate (3)</u>	\$86,776	\$51,770	0	60%	2,373
<u>Curriculum Coach</u>	\$85,468	\$34,190	0	40%	836
<u>Cert. Teachers (9)</u>	\$448,384	\$224,192	0	50%	6 4,297
	\$161,401	\$40,350	0	25%	2 717
	\$63,271	\$12,654	0	20%	1 286
<u>Assist. Teachers (15)</u>	\$82,201	\$82,201	0	100%	4 2,865
	\$49,179	\$24,589	0	50%	2 1,433
	\$100,364	\$25,090	0	25%	4 955
	\$29,749	\$8,924	0	30%	1 430
	\$17,731	\$5,851	0	33%	1 470
<u>Duration—25 minutes</u>					
Every morning X 6 staff	\$25,000	\$25,000	0	100%	
<b><u>TOTAL</u></b>	<b>\$1,560,367</b>	<b>\$772,840</b>			

FRINGE BENEFITS:

ITEM	PERCENTAGE	X	BASE	AMOUNT
Social Security	0.062	X	\$772,840	\$47,916
Medicare	.0145	X	\$772,840	\$11,206

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

**Oak Ridge City Schools' Head Start Program-Delegate**

**Grant #04CH011524-01-001**

Retirement—Certified	Variable	\$435,238	\$39,172
Retirement-Classified	Variable	\$349,799	\$16,492
Life Insurance	26 Employees X \$12.60 per month X 10 months (based on % of time per program)		\$1,644
Dental Insurance	26 Employees X \$36.53 per month X 10 months (based on % of time per program)		\$3,881
Vision Insurance	26 Employees X \$10.85 per month X 10 months (based on % of time per program)		\$1,172
Health Insurance	21 Employees at variable rates (based on % of time per program)		\$88,882

TOTAL

**TOTAL SALARIES: \$772,840**

**TOTAL FRINGE: \$210,365**

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

<u>Number of Trips</u>	<u>Destination</u>	<u>Length of Stay</u>	<u>Purpose</u>	<u>Participants</u>	<u>Cost</u>
1	Atlanta, GA	3 nights	RIVHSA Conf.	3 Staff	\$2,250
Approx. cost per person	Hotel=600		Per Diem=150		
Parking and Mileage costs for the trip, not per person			Mileage=150	Parking=150	
<b><u>TOTAL P.A. 22-TRAVEL</u></b>					<b>\$2,250</b>

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

1	Atlanta, GA	3 nights	RIVHSA Conf.	3 Staff	\$2,671
Approx. Cost per person	Hotel=600		Per Diem=150		
Parking and Mileage costs for the trip, not per person			Mileage=150	Parking=150	
1	Tennessee or Virtual	0 Nights	Child Plus	5 Staff	\$0
Approx. Cost per person	Hotel=0				
<b>TOTAL TRAVEL P.A. 20 T/TA</b>					<b>\$2,671</b>

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

<b><u>EQUIPMENT: P.A. 22</u></b>	<b><u>Cost</u></b>
There are no plans to purchase equipment at this time	\$0
<b>TOTAL P.A. EQUIPMENT</b>	<b>\$0</b>

<b><u>SUPPLIES: P.A. 22 BASIC FUNDING</u></b>	<b><u>Cost</u></b>
Postage (Office Supplies)	\$100
Medical/Dental Supplies (Other)	\$100
Classroom Supplies (Other)	\$22,465
Data Processing (Office Supplies)	\$200
Other Supplies/Family Engagement (Child & Family Service Supplies)	\$4,500
<b>TOTAL P.A. SUPPLIES</b>	<b>\$27,365</b>

<b><u>OTHER: P.A. 22 BASIC FUNDING</u></b>	<b><u>Cost</u></b>
Local Travel (Home Visits)	\$250
Conference/Training Registration Fees	\$1,500
<b>TOTAL P.A. OTHER</b>	<b>\$ 1,750</b>

<b><u>OTHER: P.A. 20 T/TA</u></b>	<b><u>Cost</u></b>
Conference/Training Registration Fees	\$2,925
<b>TOTAL P.A. OTHER</b>	<b>\$2,925</b>

**CONTRACTUAL: P.A. 22 BASIC FUNDING**

<b><u>Organization</u></b>	<b><u>Purpose/Scope of Work</u></b>	<b><u>Period</u></b>	<b><u>Cost</u></b>
Anderson Co. Health Dept./dentists/dr.	Medical and dental services for Head Start children and families	Same as grant	\$200
Mental Health Consultant Child Plus.net	Mental Health services for Head Start Children/fam. To enable program staff to enter, access and retrieve	Same as grant	\$2,500

**Oak Ridge City Schools' Head Start Program-Delegate**

**Grant #04CH011524-01-001**

	Program information timely and effectively	Same as grant	\$4,000
Other Contracted			
Services	Social/Emotional screener, classroom software	Same as grant	\$500
Teaching Strategies GOLD	To provide digital resources to support the Curriculum and classroom instruction	Same as grant	\$16,000
Family Engagement/ Family Workshops	To provide families with knowledge and understanding To better support their child to be prepared for school *training specific for fathers *training/support regarding attendance	Same as grant	\$2,448
On-site mental health counselor-Helen Ross McNabb			\$25,000
NHSA Membership			\$500
		<b>TOTAL P.A. 22 CONTRACTUAL</b>	<b>\$51,148</b>

**CONTRACTUAL: P.A. 20-T/TA**

**COST**

Teaching Strategies Gold	To provide digital resources that allow teachers to upload curriculum studies and align individual student assessment data. To provide training for teaching staff .	Same as grant	\$1,221
Conscious Discipline	To provide Conscious Discipline training materials For teaching staff and for Head Start families	Same as grant	\$1,410
Mental Health Consultant	To support staff and provide professional development Related to self-care and mental health	Same as grant	\$500
Annual membership-THSA			\$590

TOTAL P.A. 20 T/TA CONTRACTUAL \$3,721

GRAND TOTALS:

P.A. 22-BASIC FUNDING	\$1,065,718
P.A. 20-T/TA TOTAL	\$9,317
TOTAL REQUEST FOR FEDERAL FUNDS	\$1,075,035

**NON-FEDERAL RESOURCES:**

**In-Kind Contributions:**

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

Bus transportation services for Head Start students provided by the School District (LEA)	<b>\$25,612</b>
---	-----------------

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

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

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

<b><u>Staff Position</u></b>	<b><u>Number of Staff</u></b>	<b><u>Percentage going toward NFS</u></b>	
Teacher	5	50%	\$230,434
Teaching Assistant	1	25%	\$12,713
<b>TOTAL SALARY AND BENEFITS</b>			<b>\$243,147</b>
<b>TOTAL NFS</b>			<b>\$268,759</b>

**TOTAL NON-FEDERAL RESOURCES--\$268,759**



# Oak Ridge Schools

PRESCHOOL

Board of Education Approval  
T/TA (Training & Technical Assistance) Grant  
Preschool  
2025-2026

I respectfully request approval of the T/TA Plan for 2025-2026. This plan lays out how \$9,317 of T/TA Head Start funds will be utilized for our program throughout the 2025-2026 school year. The items specified in the plan are based on results from the Community Assessment and Self-Assessment and support the Head Start Grant Broad Goals.

Respectfully,

**Mrs. Lisa M Downard**

Principal

157 Carver Ave | Oak Ridge, TN 37830

[Imdownard@ortn.edu](mailto:Imdownard@ortn.edu) | (865) 425-9101

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

Every student prepared for college, career, and life success



**Oak Ridge Schools**  
PRESCHOOL

T/TA Plan 2025-2026  
 Delegate: Oak Ridge Schools' Preschool/Head Start

<b>T/TA Goal #1 -Oak Ridge Schools' Preschool/HeadStart will promote comprehensive health and mental health practices that enhance the overall well-being of preschool children and their families, to foster an environment conducive to active participation in educational opportunities.</b>								
Expected Outcomes	Indicators	Documentation/Frequency of Measurement	T/TA Strategies Events/Activities	Resource	Target Audience or HS Mgt. System	Responsible Manager	Timeline	Estimated Cost
1)Staff will affectively communicate the importance of dental care to families using culturally sensitive and age-appropriate language	*Increase the number of enrolled children who receive regular dental screening/treatment	Health report-Child Plus	*Routine information shared in classroom and schoolnewsletters *Seek community partners to distribute dental care kits and provide educational materials	Local Dentists; Health Department; local dental educational programs	Teaching staff, Family Services staff, parents	FCS Manager; Nurse	SY 2025-2026	Provided by community partners and local dentists
2) Staff will gain knowledge and understanding to incorporate Conscious Discipline to support the social-emotional well-being for students.	*Increased use of Conscious Discipline concepts	sign in sheets, agenda, PLC notes	* Provide professional development around Conscious Discipline topics identified in annual needs assessment and the areas identified in the implementation guide for administrators *On-site training with consultant	Surveys, Implementation guides, Conscious Discipline materials	All Staff	Director,FCS Manager, EducationManager, CurriculumCoach	SY2025-2026	\$4,500
3)Families will increase their knowledge and understanding of the fundamentals of Conscious Discipline to create an alignment between the classroom and home to support children's social-emotional development	*Families participation in Conscious Discipline parent workshops	training sign-in sheets, agenda; parent surveys	*Provide Consoius Discipline training for parents	Conscious Discipline materials	Families	FCS Manager; Director	SY2025-2026	\$1,000
<b>Total to support Goal 1</b>								<b>\$5,500</b>
<b>T/TA Goal # 2:Oak Ridge Schools' Preschool/HeadStart will enhance the nutritional knowledge and habits of preschool children and their families by promoting classroom cooking experiences of nutritious foods, implementing an organic school garden, engaging with community partners to support healthy eating at home, and establishing a Healthy Schools Committee.</b>								
Expected Outcomes	Indicators	Documentation/Frequency of Measurement	T/TA Strategies Events/Activities	Resource	Target Audience or HS Mgt. System	Responsible Manager	Timeline	Estimated Cost
1)Classroom staff will increase knowledge and understanding regarding effective methods to teach children about nutrition and the benefits of healthy cooking	* increased hands-on cooking in classrooms * increased students' knowledge of food preparation, nutritional value, and the importance of balanced meals	lesson plans; PLC notes	Staff professional development and scheduled time within PLC meetings	Creative Curriculum UT Agriculture	Teaching Staff	Education Coordinator; Curriculum Coach	SY2025-2026	Provided by Program Staff,and community partners
2)Staff will receive training on organic gardening practices and curriculum integration, enabling them to effectively maintain the school garden and use it as a dynamic learning tool. This training will equip staff with the knowledge to engage children in hands-on gardening activities, fostering an understanding of food origins and the benefits of fresh produce, while also promoting healthy eating habits among students.	*classroom participation in tending the garden *students increase interest in eating fresh fruits and vegetables	sign-in sheets; lesson plans;PLC notes; student survey results	*training related to tending a garden * training related to incorporating into lesson plans	Community Partner-GROW Oak Ridge	Teaching Staff	FCS Manager, Education Manager, CurriculumCoach	SY2025-2026	Provided by Program Staff and community partner
<b>Total to Support Goal 2</b>								<b>\$0</b>

T/TA Plan 2025-2026  
 Delegate: Oak Ridge Schools' Preschool/Head Start

T/TA Goal # 3: Oak Ridge Schools' Preschool/ HeadStart will strengthen family and community engagement by addressing chronic absenteeism, increasing parental involvement in classroom and building experiences, and fostering inclusive male engagement throughout								
Expected Outcomes	Indicators	Documentation/Frequency of Measurement	T/TA Strategies Events/Activities	Resource	Target Audience or HS Mgt. System	Responsible Manager	Timeline	Estimated Cost
1)Families will increase understanding of the significance of regular attendance and the resources available to assist them	* Increased student attendance and a decrease in chronic absenteeism	Child Plus reports	*communication with families related to importance of regular attendance *develop strong relationships between classroom staff and families to promote trust	Family Resource Center; FCS manager	families	Director; FCS Manager	SY 2025-2026	Provided by Program Staff
2)Staff will increase knowledge of policies and procedures related to student attendance	*accurate reporting and timely follow-up to student attendance	Event notes in Child Plus; communication logs, Child Plus reports	*provide training related to policies and procedures; *ongoing support	Director; ERSEA Manager; Performance Standards	All staff	Director, ERSEA manager	SY 2025-2026	Provided by Program Staff
3) Staff will develop understanding of relationship building with families to increase parent involvement in school activities	*Increase in parent volunteers; *increase in parent participation in school activities	sign-in sheets; volunteer logs	*Professional Development related to the importance of building relationships with families	Head Start.gov	All staff	FCS Manager; Director;	SY2025-2026	Provided by Program Staff
<b>Total to support Goal 3</b>								<b>\$0</b>
T/TA Goal #4: Oak Ridge Schools' Preschool/HeadStart will establish a comprehensive tracking system that facilitates vertical alignment as students transition from preschool to kindergarten and beyond. The program will create a seamless educational continuum by coll								
Expected Outcomes	Indicators	Documentation/Frequency of Measurement	T/TA Strategies Events/Activities	Resource	Target Audience or HS Mgt. System	Responsible Manager	Timeline	Estimated Cost
1) Teachers will increase knowledge of vertical alignment of pre-k to kindergarten to support improved transitions.	* increased student success as they transition to kindergarten and beyond as measured by Power BI data system	Power BI data system	*meet at least annually with school district's kindergarten team * visit kindergarten classrooms. * develop a universal transition form to be used	Elementary administration team; PLC coordinator; Curriculum Coach; District curriculum directors	classroom teachers	Director;Curriculum Coach; Education Manager	SY 2025-2026	Provided by Program Staff
<b>Total to support Goal 4</b>								<b>\$0</b>
T/TA School Readiness Goals								
Expected Outcomes	Indicators	Documentation/Frequency of Measurement	T/TA Strategies Events/Activities	Resource	Target Audience or HS Mgt. System	Responsible Manager	Timeline	Estimated Cost
1)Teachers will continue to improve classroom instruction and use of developmentally appropriate practices through the use of Creative Curriculum, understanding of ELOF, TN-ELDS, and Conscious Discipline	*Increased student growth; *Improved student outcomes	TSG data	*Professional Development related to curriculum implementation * training related to meeting individual needs; *PLC process; *virtual and in-person workshops and other training opportunities	Curriculum resources; Conscious Discipline resources; Head Start.gov	Classroom Staff	Director; Education Manager, CurriculumCoach	SY 2025-2026	\$3,817
<b>Total to support School Readiness Goals</b>								<b>\$3,817</b>

T/TA Plan 2025-2026  
 Delegate: Oak Ridge Schools' Preschool/Head Start

Required Training	Resource	Target Audience	Expected Outcomes	Responsible Manager	Timeline	Estimated Cost
Child CPR First Aid and Safety	State Certified Trainers, Oak Ridge Schools' system-wide nurse	Teaching Staff	Appropriate safety practices and first aid procedures followed in the event of an emergency situation	Director	By existing expiration date and/or SY2025-2026	ORS District staff and certified trainer
<b>Additional Required Trainings:</b> <ul style="list-style-type: none"> <li>• Childhood emergencies</li> <li>• Health Policies</li> <li>• Childhood safety</li> <li>• Medication Administration procedures</li> <li>• Poison Control</li> <li>• Blood Borne Pathogen Control</li> <li>• Food Allergies</li> <li>• Supervision during high risk activities such as eating and outdoor play</li> </ul> Identification and Reporting of Child Abuse & Neglect: <ul style="list-style-type: none"> <li>• Definitions</li> <li>• Laws/regulations</li> <li>• Program policies/procedures</li> </ul> Child Growth & Development for parents: *Planned learning activities discussed at parent meetings, parent/teacher conferences, workshops, and home visits *Newsletters share information on several of these areas also: <b>Nutrition Staff will attend HS and CACFP Nutrition Training</b>	Certified Trainers , Oak Ridge Schools' system-wide nurse,  Dept. of Children and Families & Prevent Child Abuse TN  Management staff, community agencies, T/TA network  CACFP, T/TA Network	All staff  All Staff  Parents and family members  Director	Appropriate safety practices and first aid procedures followed in the event of an emergency situation  Staff will recognize and report any known and/or suspected child abuse and neglect according to laws and regulations  Head Start parents/caregivers will increase their knowledge and confidence regarding child development and how to best meet their own child's needs  Knowledgeable staff that follow program policies, Head Start Performance Standards and state licensure requirements	Director  Compliance Manager  FCS Manager; Education Manager  Director	New staff within the first 2 weeks on the job/other staff as needed by existing expiration date and/or SY2025-2026  August 2025  SY2025-2026  SY2025-2026	Program Staff or Oak Ridge Schools' Employee  Program Staff or Community Partners  Program Staff  Paid from Base Grant
<b>Total to support Required Head Start Training</b>						
Required Training	Resource	Target Audience	Expected Outcomes	Responsible Manager	Timeline	Estimated Cost
<b>Head Start Education Training:</b> ~Classroom environment ~Child Development ~ Assessment ~ Discipline & Guidance ~ Literacy & Handwriting ~Math ~Science ~Discovery ~ Art & Music ~ Dramatic Play ~ Cultural Diversity ~ Health & Wellness ~ Special curricula Training on Head Start performance standards ~STEM	Direct Service & Management staff  T/TA network	Teaching staff	Teaching staff will become more knowledgeable and confident in providing quality educational services to children and their families	Education Manager	SY2025-2026	Provided by ORS and Program Staff
<b>Required Training, continued</b>						
~ Agency policies and procedures, including program philosophy ~ Emergency Procedures ~ Job Description ~ Reporting requirements for suspected cases of child abuse and neglect ~ Discipline policies ~Policies for dismissing and receiving children	Admin. Staff	All Staff	Knowledgeable staff that follow program policies, Head Start Performance Standards and state licensure requirements	Director, Education Manager	SY 2025-20265	Provided by Program staff and Community Partners
~ Parent-Teacher Communication ~ Disease Control ~ Health Promotion ~ Overview of Licensing Requirements ~ Information on Risks (Infection, Stress, CMV)	Admin. Staff	All Staff	Knowledgeable staff that follow program policies, Head Start Performance Standards and state licensure requirements	FCS Manager and Education Coordinator	SY2025-2026	Provided by Education Coorfinator and Health Manage
24 Clock Hours of Training as follows: ~ Six (6) hours (CPR/First Aid, CACFP, Childhood Food Allergies, Injury Control) ~ Two(2) Hours in Identifying and reporting child abuse ~ Ten (10) Hours of other related training (one to one consulting sessions, academic course, etc.) Supervision, parent communication, ~ Six (6) hours Literacy	Admin. Staff	All Staff	Knowledgeable staff that follow program policies, Head Start Performance Standards and state licensure requirements	Director/ Education Manager	SY2025-2026	Provided by Program staff and Community Partners
<b>Total to support Required Training</b>						<b>\$0</b>

T/TA Plan 2025-2026  
Delegate: Oak Ridge Schools' Preschool/Head Start

<b>Total T/TA Plan</b>						<b>9,317</b>		
							2/21/2025	



# Oak Ridge Schools

Business Office

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

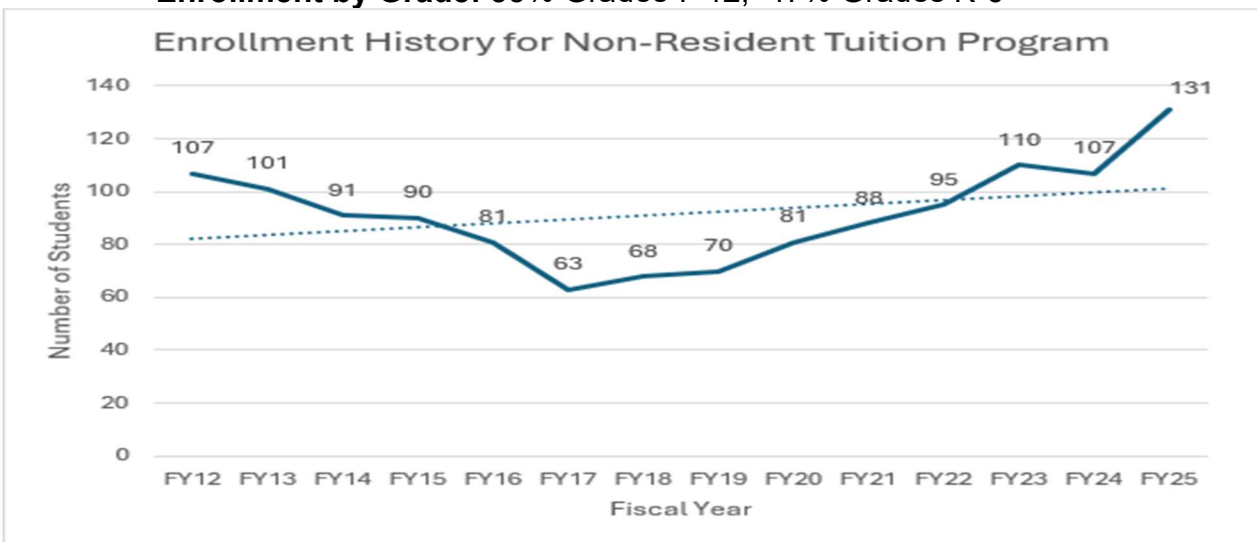
## Memorandum

**To:** Dr. Bruce Borchers, Superintendent  
**From:** Jenifer Van Dyke, Executive Director of Finance  
**Date:** March 24, 2025  
**Re:** Tuition Rates for 2025-2026 School Year

Board Policy 6.204 requires students who are not legal residents of Oak Ridge to pay tuition as approved annually by the Board of Education. A copy of the proposed tuition rates for the 2025-26 school year is attached. Non-resident tuition availability for FY26 will be determined by actual enrollment of resident students and capacity at each school.

The Non-Resident Tuition Statistics for 2024-25 School Year are as follows:

- **Total Tuition Students** 131
- **Tuition Revenue** \$379,686.01
- **Percentage by County:** 31% Anderson County; 21% Roane County; 38% Knox County; and 10% Other Tennessee Counties
- **Enrollment by Grade:** 53% Grades 7-12; 47% Grades K-6



Attachment: 2025-26 Tuition Rates



## Oak Ridge Schools

### Non-Resident Tuition Rates

### 2025-2026 School Year

		FY 2025	FY 2026
Anderson County Residents	Grades K-12	\$3,600	<b>\$3,722</b>
Roane County Residents	Grades K-12	\$3,600	<b>\$3,722</b>
Other Tennessee County Residents	Grades K-12	\$8,162	<b>\$8,011</b>
Out of State Residents	Grades K-12	\$14,279	<b>\$13,836</b>

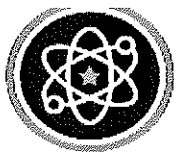
\*\*Please refer to Board Policy 6.204 for information relating to employees and non-resident tuition rates.

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

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

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

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



## Memorandum

To: **Dr. Bruce Borchers, Superintendent**  
**Jenifer Van Dyke, Finance Director**

From: **Beth Estep, ORHS Assistant Principal**

Date: **2/24/2025**

Subject: **Publication Agreement for Oak Log Year 2025/2026**

It is recommended the Oak Ridge Board of Education accept the bid from Jostens for the annual Oak Log yearbook bid. Their bid of \$49,625.00 plus shipping was the best price that met specifications. Bids ranged from \$49,625.00 to \$50,279.26. The bid includes specified requirements.

Bids were advertised in accordance with state guidelines and were available on the Oak Ridge Schools website. Two companies responded with bids.

It is our recommendation to contract with Jostens this year for the 2025-2026 yearbook at ORHS. The services provided by the yearbook representative for training and on-site support are superior and a critical component of our choice.

*Principal*  
**Drayton Hawkins**

*Assistant Principals*  
**Beth Estep**  
**David Foust**  
**Jennifer Milligan**  
**Stephanie Thompson**  
**Russ Wise**

*Athletic Director*  
**Joe Gaddis**

*The Oak Log*  
Adviser: Rachael Pryfogle  
Oak Ridge High School  
1450 Oak Ridge Turnpike  
Oak Ridge, TN 37830  
Phone: 865-425-9601

January 16, 2025

Oak Ridge High School Bid Specifications for the 2025-2026 yearbook  
(*The Oak Log*):

**Awarding of bid:**

Bid will be made on an all or none basis. The right is reserved in the interest of Oak Ridge High School to reject any or all bids and to waive any minor informality in bids received and to award the contract to a vendor other than the low bidder.

**General Specifications of the Book:**

(Note to bidder: If more than one price program is available, please indicate options and the prices involved.)

Number of copies: 775

Size of book: 9x12

Number of pages: 264

Printing: Printing of the *Oak Log* will be accomplished by offset lithography in the plant of the printer.

Cover: 4-color process color, staff designed: Included  
Embossed cover: Included, charge for embossing die  
Grained cover: Included  
Hard copy of actual cover in advance: Included  
Lithographed cover: Included

End sheets: Process color, staff designed end sheets, different front and back. Included

Color: All pages in 4-process color on four forms is to be included.  
Agreed

Paper stock: 100 pound double coat gloss enamel, dull enamel, or matte finish. Included

Publishing: Pages will be submitted online, using company program.  
Agreed - Monarch or Layout Pro

Please detail corrections costs. No correction costs unless pages have already been printed, then a quote from the plant is required.

Page Proofs: Final proofs on cover, end sheets and all pages. Only proofs showing copy and photographs fully stripped into position will be acceptable. Agreed

Delivery: The delivery date for the 2025-2026 *Oak Log* will be no later than April 27, 2026. Agreed, provided all deadlines are met

Base cost for above specifications:

\$49,625.00

INCLUDED ITEMS PROVIDED BY JOSTENS AT NO ADDITIONAL CHARGE:

- Plant trip to Jostens Publishing in Clarksville, TN for adviser and yearbook staff to learn about the publishing of yearbooks first hand. Lunch will be provided.
- Online Sales for both yearbook and parents ads
- Online parent ad creation
- Professional Artist Session for cover and theme development
- In class training and support along with our award winning digital curriculum
- Summer workshop/training day(s) for the entire yearbook staff.
- Yearbook+ at no additional charge. Additional coverage without adding pages.
- Jostens Renaissance



# OAK RIDGE SCHOOLS

## Technology Department

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



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## MEMORANDUM

**Date:** March 7, 2025

**To:** Kelly Williams

**From:** Doug Cofer 

**Subject:** 5<sup>th</sup>-12<sup>th</sup> Grade Student Laptop

I recommend purchasing approval of 3,500 Lenovo laptops in the amount of \$3,111,500. The current student laptops are over 4 years old and are out of warranty. Purchase would be dependent on FY26 budget approval. Funds would come from account 141-71100-722-000-000-00000-226.

This purchase is utilizing the NASPO contract, which meets bidding requirements.



Thank you for choosing CDW. We have received your quote.

Hardware      Software      Services      IT Solutions      Brands      Research Hub

# QUOTE CONFIRMATION

**SUSAN DUNDORE,**

Thank you for considering CDW•G for your technology needs. The details of your quote are below. **If you are an eProcurement or single sign on customer, please log into your system to access the CDW site.** You can search for your quote to retrieve and transfer back into your system for processing.

For all other customers, click below to convert your quote to an order.

**Convert Quote to Order**

QUOTE #	QUOTE DATE	QUOTE REFERENCE	CUSTOMER #	GRAND TOTAL
PHRW008	2/24/2025	LENOVO 13W WITH SERVICES	0729655	<b>\$3,111,500.00</b>

**IMPORTANT - PLEASE READ**

**Special Instructions:** LENOVO TN NASPO CONTRACT  
LENOVO TN NASPO CONTRACT

**QUOTE DETAILS**

ITEM	QTY	CDW#	UNIT PRICE	EXT. PRICE
<a href="#">LVO 13W 2IN1 I51334U W11P MC00036587</a> Mfg. Part#: 83MAS02R00-MC00036587 Contract: Tennessee Lenovo NVP Computer Equipment (81353)	3500	8288617	\$839.00	\$2,936,500.00
<b>NEW ITEM</b> Mfg. Part#: NEW-ITEM Services include: Autopilot enrollment Imaging Asset tagging Etching Delivery to a requested location(s) Contract: MARKET	3500	NEW-ITEM	\$50.00	\$175,000.00

<b>SUBTOTAL</b>	\$3,111,500.00
<b>SHIPPING</b>	\$0.00
<b>SALES TAX</b>	\$0.00
<b>GRAND TOTAL</b>	<b>\$3,111,500.00</b>

PURCHASER BILLING INFO	DELIVER TO
<b>Billing Address:</b> OAK RIDGE SCHOOLS 304 NEW YORK AVE OAK RIDGE, TN 37830-5217 <b>Phone:</b> (865) 425-9004 <b>Payment Terms:</b> NET 30 Days-Govt/Ed	<b>Shipping Address:</b> OAK RIDGE SCHOOLS 127 PROVIDENCE RD SUITE 100 OAK RIDGE, TN 37830 <b>Shipping Method:</b>

## Lenovo 13w 2-in-1 Gen 3

### CONFIGURATION DETAILS

Part Number	SKU (MTM_VK)	Component	Description
83MAS02R00			Notebook Lenovo 13w 2-in-1 Gen 3 83MACTO
	5WS0W28633	SERVICE	WARRANTY 4Y Courier/Carry-in
	5PS0W28630	SERVICE	PROTECTION 4Y ADP Add On
	83MA_VK00061089	Country/Region	USA
	83MA_VK00206775	Marketing Name	Lenovo 13w 2-in-1 Gen 3
	83MA_VK00028571	Preload Type	Standard Image (Preload)
	83MA_VK00110011	Preload OS	Windows 11 Pro 64
	83MA_VK00154555	vPro Certified Model	Non vPro
	83MA_VK00154655	Processor	13th Generation Intel® Core™ i5-1334U Processor (E-cores up to 3.40 GHz P-cores up to 4.60 GHz)
	83MA_VK00210919	USB-C Port	USB-C Port Soldered
	83MA_VK00069954	Security Chip Setting	Enabled Discrete TPM2.0
	83MA_VK00175603	Color	Luna Grey
	83MA_VK00206774	Display	13.3" WUXGA (1920 x 1200), IPS, Anti-Smudge, Touch, 45%NTSC, 400 nits, 60Hz
	83MA_VK00107557	Graphics	Integrated Intel® Iris® Xe Graphics
	83MA_VK00120678	Camera	1080P FHD IR Hybrid with Microphone
	83MA_VK00120746	Second Camera	No Second Camera
	83MA_SBB0R38263	Fingerprint Reader	No Fingerprint Reader
	83MA_VK00206777	Total Memory	16 GB DDR5-5600MT/s (8 GB Soldered + 8 GB SODIMM)
	83MA_VK00206776	Onboard Memory	8 GB DDR5-5600MT/s (Soldered)
	83MA_SBB1K66587	DIMM Memory	8 GB DDR5-5600MT/s (SODIMM)
	83MA_SBB1B02938	Storage Selection	512 GB SSD M.2 2242 PCIe Gen4 TLC Opal
	83MA_VK00182534	Wireless LAN	Intel® Wi-Fi 6E AX211 2x2 AX & Bluetooth® 5.1 (Windows 10) or Bluetooth® 5.3 (Windows 11)
	83MA_VK00107034	Battery	4 Cell Li-Polymer 54.7Wh
	83MA_SBB1P81771	Power Adapter	65W USB-C 90% PCC 2pin AC Adapter - US
	83MA_SBB1H35250	Keyboard	Grey - English
	83MA_SBB0V88740	Publication	Publication - Polish/Portuguese/English
	83MA_VK00112009	OS DPK	W11 Pro
	83MA_VK00186810	Preload Language	Windows 11 Pro 64 English (US)/English (UK)
	83MA_SBB1N85576	System Unit	13wG3 i5-1334U IG+8G NE

83MA_SBB1N85580	Display Shell	13.3" WUXGA (1920 x 1200), IPS, Anti-Smudge, Touch, 45%NTSC, 400 nits, 60Hz, 1080P FHD IR Hybrid with Mic
83MA_SBB1J32894	Package Box Type	Single Standard Packaging
83MA_SBB1B67279	Lenovo Pen	Lenovo Integrated Pen (Black)
83MA_VK00150093	Adobe Elements	No Adobe Elements
83MA_VK00150092	Adobe Creative Cloud	No Adobe Creative Cloud
83MA_VK00150091	Adobe Acrobat	No Adobe Acrobat
83MA_VK00120542	Microsoft Office	No Microsoft Office
83MA_VK00120545	Security Software	No Security Software
83MA_VK00111980	Cloud Security Software	No Cloud Security Software
83MA_VK00080006	Absolute BIOS Selection	BIOS Absolute Enabled
83MA_VK00120441	CO2 Offset Label	No CO2 Offset Label
83MA_SBB1C55329	Offering Model	Relationship Model
83MA_VK00110994	OS Type	Windows 11 Pro
83MA_VK00061438	GEO	NA
83MA_SBB0X80861	Publication 2	PUB POL/POR/BUL/BRL/SPA/ENG
83MA_SBB0S70758	CPU Label	Core i5
83MA_SBB1B66834	ICPS	ICPS Disabled
83MA_SBB1B67452	Region	ROW
83MA_VK00121596	Digital Learning Horus	No Horus Education Bundle
83MA_VK00109208	Digital Learning Analytics	No Digital Learning Analytics
83MA_VK00109209	Digital Learning Classroom	No Digital Learning Classroom
83MA_VK00182623	Second Digital Classroom	No Second Digital Classroom
83MA_VK00109211	Digital Learning MDM	No Digital Learning MDM
83MA_VK00109210	Digital Learning Filter	No Digital Learning Filter
83MA_VK00182474	Endpoint Management	No Endpoint Management
83MA_VK00204159	Content Filtering	No Content Filtering
83MA_VK00122692	Ethernet	No Wired Ethernet
83MA_VK00071527	Warranty	N13 1Y Mailin

**Participating Addendum Number 81353**  
**for**  
**NASPO COMPUTER EQUIPMENT, PERIPHERALS & RELATED SERVICES**  
**between**  
**STATE OF TENNESSEE**  
**and**  
**Lenovo (United States) Inc.**

This Participating Addendum is entered into by the STATE OF TENNESSEE ("Participating Entity") and the following Contractor (each a "Party" and collectively the "Parties") for the purpose of participating in NASPO ValuePoint Master Agreement Number 23013 executed by Contractor and the State of Minnesota for Computer Equipment, Peripherals & Related Services ("Master Agreement"):

Lenovo (United States) Inc. ("Contractor")  
8001 Development Drive  
Morrisville, NC 27560

**I. PARTICIPATING ADDENDUM CONTACTS.**

Contractor's contact for this Participating Addendum is:

Lance Couch  
Contract Manager  
lcouch@lenovo.com  
281-712-2155

Participating Entity's contact for this Participating Addendum is:

Zohreh Hurd  
Category Specialist – Technology  
[Zohreh.hurd@tn.gov](mailto:Zohreh.hurd@tn.gov)  
615-741-2026

- II. TERM.** The term, renewal, and extension provisions of this Participating Addendum are set forth in Attachment A, Special Terms and Conditions, Sections 25-27. This Participating Addendum will terminate upon termination of the Master Agreement, as amended, unless the Participating Addendum is terminated sooner in accordance with the terms set forth herein.
- III. PARTICIPATION AND USAGE.** This Participating Addendum may be used by all state agencies, institutions of higher education, cities, counties, districts, and other political subdivisions of the state, and nonprofit organizations within the state if authorized herein and by law. Participating Entity has sole authority to determine which entities are eligible to use this Participating Addendum. If Contractor becomes aware that an entity's use of this Participating Addendum is not authorized, Contractor will notify NASPO ValuePoint to initiate outreach to the appropriate parties.
- IV. GOVERNING LAW.** The construction and effect of this Participating Addendum and any Orders placed hereunder will be governed by, and construed in accordance with, Participating Entity's laws.
- V. SCOPE.** Except as otherwise stated herein, this Participating Addendum incorporates the scope, pricing, terms, and conditions of the Master Agreement and the rights and obligations set forth therein as applied to the Contractor and Participating Entity and Purchasing Entities.
- a. **Services.** All services available through the Master Agreement may be offered and sold by Contractor to Purchasing Entities.
  - b. **Equipment Leasing.** No leasing is allowed under this Participating Addendum
  - c. **Equipment Trade-in Program.** No trade-ins are allowed under this Participating Addendum
  - d. **Contractor Partners.** All subcontractors, dealers, distributors, resellers, and other partners identified on Contractor's NASPO ValuePoint webpage as authorized to provide Products and Services to Participating Entity may provide Products and Services to users of this Participating Addendum. Contractor will ensure that the participation of Contractor's subcontractors, dealers, distributors,

**Participating Addendum Number 81353 for  
COMPUTER EQUIPMENT, PERIPHERALS & RELATED SERVICES**

Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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resellers, and other partners is in accordance with the terms and conditions set forth in the Master Agreement and in this Participating Addendum.

Any amendment to the Master Agreement shall be deemed incorporated into this Participating Addendum unless the amendment is rejected by the Participating Entity in writing to Contractor within ten (10) calendar days of the amendment's effective date and is documented thereafter via written amendment hereto.

**Any conflict between this Participating Addendum and the Master Agreement will be resolved in favor of the Participating Addendum.**

- VI. ORDERS.** Purchasing Entities may place orders under this Participating Addendum by referencing the Participating Addendum Number on an Order. Each Order placed under this Participating Addendum is subject to the pricing and terms set forth herein and in the Master Agreement, including applicable discounts, reporting requirements, and payment of administrative fees to NASPO ValuePoint and Participating Entity, if applicable.
- VII. PARTICIPATING ENTITY REPORTING REQUIREMENTS AND ADMINISTRATIVE FEE.** See Special Terms and Conditions Term #22. Statewide Contract Reports and Term #30. Administrative Fees
- VIII. FEDERAL FUNDING REQUIREMENTS.** Orders funded with federal funds may have additional contractual requirements or certifications that must be satisfied at the time the Order is placed or upon delivery. When applicable, a Purchasing Entity will identify in the Order any alternative or additional requirements related to the use of federal funds. By accepting the Order, Contractor agrees to comply with the requirements set forth therein.
- IX. INFORMATION TECHNOLOGY SECURITY STANDARDS.**
- X. ATTACHMENTS.** This Participating Addendum includes the following attachments:
- a. Attachment A: Participating Entity Modifications and Additions to Master Agreement Terms and Conditions
  - b. Attachment B: Diversity Letter
  - c. Attachment C: Attestation
  - d. Attachment D: Statement of Work
  - e. Attachment E: Participating Entity Product and Service Exclusions and Clarifications
  - f. Attachment F: Protection of Federal Tax Information
- XI. NOTICE.** Any notice required herein shall be sent to the following:
- |                   |   |
|-------------------|---|
| For Contractor:   | For Participating Entity:   |
| Lance Couch       | Zohreh Hurd   |
| Contract Manager  | Category Specialist – Technology                                  |
| lcouch@lenovo.com | <u><a href="mailto:Zohreh.hurd@tn.gov">Zohreh.hurd@tn.gov</a></u> |
| 281-712-2155      | 615-741-2026  |
- XII. SUBMISSION OF PARTICIPATING ADDENDUM TO NASPO VALUEPOINT.** Upon execution, Contractor shall email a copy of this Participating Addendum and any amendments hereto to NASPO ValuePoint at [pa@haspovaluepoint.org](mailto:pa@haspovaluepoint.org). While Participating Entity will maintain the official record of this Participating Addendum, the Parties agree that this Participating Addendum, as amended, may be published on the NASPO ValuePoint website.

**SIGNATURE**

The undersigned for each Party represents and warrants that this Participating Addendum is a valid and legal agreement binding on the Party and enforceable in accordance with the Participating Addendum's terms and

**Participating Addendum Number 81353 for  
NASPO COMPUTER EQUIPMENT, PERIPHERALS & RELATED SERVICES**

Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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that the undersigned is duly authorized and has legal capacity to execute and deliver this Participating Addendum and bind the Party hereto.

IN WITNESS WHEREOF, the Parties have executed this Participating Addendum.

**CONTRACTOR:**



**Signature**

Anthony Pichardo

**Printed Name**

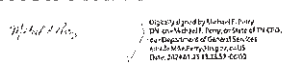
Executive Director

**Title**

1/25/24

**Date**

**PARTICIPATING ENTITY:**



**Signature**

Michael F. Perry

**Printed Name**

Chief Procurement Officer

**Title**

1/25/24

**Date**

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Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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**Attachment A**

State of Tennessee  
("State," "Participating Entity," or "Purchasing Entity")

**NASPO ValuePoint COMPUTER EQUIPMENT, PERIPHERALS & RELATED SERVICES 2023-2028**

All references to "Contract" hereinbelow shall collectively refer to the "Master Contract",  
"Participating Addendum", and "Supplemental Terms and Conditions"

**Supplemental Terms and Conditions**



**Standard Terms and Conditions**

1. **Required Approvals.** The State is not bound by this Contract until it is duly approved by the Parties and all appropriate State officials in accordance with applicable Tennessee laws and regulations. Depending upon the specifics of this Contract, this may include approvals by the Commissioner of Finance and Administration, the Commissioner of Human Resources, the Comptroller of the Treasury, and the Chief Procurement Officer. Approvals shall be evidenced by a signature or electronic approval.
2. **Communications and Contacts.** All instructions, notices, consents, demands, or other communications required or contemplated by this Contract shall be in writing and shall be made by certified, first class mail, return receipt requested and postage prepaid, by overnight courier service with an asset tracking system, or by email or facsimile transmission with recipient confirmation. All communications, regardless of method of transmission, shall be addressed to the respective Party at the appropriate mailing address, facsimile number, or email address as stated below or any other address provided in writing by a Party.

The State:

Zohreh S. Hurd, Category Specialist – Technology  
Central Procurement Office, Department of General Services (DGS)  
312 Rosa L. Parks Ave., Nashville, TN 37243  
Tennessee Tower, 3rd Floor  
[Zohreh.hurd@tn.gov](mailto:Zohreh.hurd@tn.gov)  
615-741-2026

The Contractor:

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NASPO COMPUTER EQUIPMENT, PERIPHERALS & RELATED SERVICES**

Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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Lenovo (United States) Inc.  
Lance Couch, Contract Manager  
8001 Development Drive, Morrisville, NC 27560  
lcouch@lenovo.com  
281-712-2155  
Fax N/A

All instructions, notices, consents, demands, or other communications shall be considered effective upon receipt or recipient confirmation as may be required.

3. Modification and Amendment. This Contract may be modified only by a written amendment signed by all Parties and approved by all applicable State officials.
4. Subject to Funds Availability. The Contract is subject to the appropriation and availability of State or federal funds. In the event that the funds are not appropriated or are otherwise unavailable, the State reserves the right to terminate this Contract upon written notice to the Contractor. The State's exercise of its right to terminate this Contract shall not constitute a breach of Contract by the State. Upon receipt of the written notice, the Contractor shall cease all work associated with the Contract. If the State terminates this Contract due to lack of funds availability, the Contractor shall be entitled to compensation for all conforming goods requested and accepted by the State and for all authorized services completed in accordance with the Contract as of the termination date. Should the State exercise its right to terminate this Contract due to unavailability of funds, the Contractor shall have no right to recover from the State any actual, general, special, incidental, consequential, or any other damages of any description or amount.
5. Termination for Convenience. The State may terminate this Contract for convenience without cause and for any reason. The State shall give the Contractor at least thirty (30) days written notice before the termination date. The Contractor shall be entitled to compensation for all conforming goods delivered and accepted by the State or for authorized services completed in accordance with the Contract as of the termination date. In no event shall the State be liable to the Contractor for compensation for any goods neither requested nor accepted by the State or for any services neither requested by the State nor performed by the Contractor in accordance with this Contract. In no event shall the State's exercise of its right to terminate this Contract for convenience relieve the Contractor of any liability to the State for any damages or claims arising under this Contract.
6. Termination for Cause. If the Contractor fails to properly perform its obligations under this Contract in a timely or proper manner, or if the Contractor materially violates any terms of this Contract ("Breach Condition"), the State shall promptly notify Contractor of the alleged breach and Contractor shall have thirty (30) day's to cure the alleged breach. Thereafter, if the alleged breach remains uncured, the State shall have the right to terminate the Contract and withhold payments in excess of compensation for completed services or provided goods. Notwithstanding the above, the Contractor shall not be relieved of liability to the State for damages sustained by virtue of any Breach Condition and the State may seek other remedies allowed at law or in equity for breach of this Contract.
7. Assignment and Subcontracting. The Contractor shall not assign this Contract or enter into a subcontract for any of the goods or services provided under this Contract without the prior written approval of the State. Notwithstanding any use of the approved subcontractors, the Contractor shall be the prime contractor and responsible for compliance with all terms and conditions of this Contract. The State

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Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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reserves the right to reasonably request additional information or reasonably impose additional terms and conditions before approving an assignment of this Contract in whole or in part or the use of subcontractors in fulfilling the Contractor's obligations under this Contract.

8. Conflicts of Interest. The Contractor warrants that no part of the Contractor's compensation shall be paid directly or indirectly to an employee or official of the State of Tennessee as wages, compensation, or gifts in exchange for acting as an officer, agent, employee, subcontractor, or consultant to the Contractor in connection with any work contemplated or performed under this Contract.

The Contractor acknowledges, understands, and agrees that this Contract shall be null and void if the Contractor is, or within the past six (6) months has been, an employee of the State of Tennessee or if the Contractor is an entity in which a controlling interest is held by an individual who is, or within the past six (6) months has been, an employee of the State of Tennessee.

9. Nondiscrimination. The Contractor hereby agrees, warrants, and assures that no person shall be excluded from participation in, be denied benefits of, or be otherwise subjected to discrimination in the performance of this Contract or in the employment practices of the Contractor on the grounds of handicap or disability, age, race, creed, color, religion, sex, national origin, or any other classification protected by federal or state law. The Contractor shall, upon request, show proof of nondiscrimination and shall post in conspicuous places, available to all employees and applicants, notices of nondiscrimination.

10. Prohibition of Illegal Immigrants. The requirements of Tenn. Code Ann. § 12-3-309 addressing the use of illegal immigrants in the performance of any contract to supply goods or services to the state of Tennessee, shall be a material provision of this Contract, a breach of which shall be grounds for monetary and other penalties, up to and including termination of this Contract.

- a. The Contractor agrees that the Contractor shall not knowingly utilize the services of an illegal immigrant in the performance of this Contract and shall not knowingly utilize the services of any subcontractor who will utilize the services of an illegal immigrant in the performance of this Contract. The Contractor shall reaffirm this attestation, in writing, by submitting to the State a completed and signed copy of the document at Attachment C: Attestation, semi-annually during the Term. If the Contractor is a party to more than one contract with the State, the Contractor may submit one attestation that applies to all contracts with the State. All Contractor attestations shall be maintained by the Contractor and made available to State officials upon request.
- b. Prior to the use of any subcontractor in the performance of this Contract, and semi-annually thereafter, during the Term, the Contractor shall obtain and retain a current, written attestation that the subcontractor shall not knowingly utilize the services of an illegal immigrant to perform work under this Contract and shall not knowingly utilize the services of any subcontractor who will utilize the services of an illegal immigrant to perform work under this Contract. Attestations obtained from subcontractors shall be maintained by the Contractor and made available to State officials upon request.
- c. The Contractor shall maintain records for all personnel used in the performance of this Contract to the extent required by applicable law. Contractor's records shall be subject to review and random inspection at any reasonable time, with minimal business disruption, upon reasonable notice by the State.
- d. The Contractor understands and agrees that failure to comply with this section will be subject to the sanctions of Tenn. Code Ann. § 12-3-309 for acts or omissions occurring after its effective date.

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- e. For purposes of this Contract, "illegal immigrant" shall be defined as any person who is not: (i) a United States citizen; (ii) a Lawful Permanent Resident; (iii) a person whose physical presence in the United States is authorized; (iv) allowed by the federal Department of Homeland Security and who, under federal immigration laws or regulations, is authorized to be employed in the U.S.; or (v) is otherwise authorized to provide services under the Contract.
11. Records. The Contractor shall maintain documentation for all charges under this Contract. The books, records, and documents of the Contractor, for work performed or money received under this Contract, shall be maintained for a period of five (5) full years from the date of the final payment and shall be subject to audit at any reasonable time, with reasonable frequency and upon reasonable notice by the State, the Comptroller of the Treasury, or their duly appointed representatives. The financial statements shall be prepared in accordance with generally accepted accounting principles.
12. Monitoring. The Contractor's activities conducted and records maintained pursuant to this Contract shall be subject to reasonable monitoring and reasonable evaluation by the State, the Comptroller of the Treasury, or their duly appointed representatives.
13. Progress Reports. The Contractor shall submit brief, periodic, progress reports to the State as requested.
14. Strict Performance. Failure by any Party to this Contract to require, in any one or more cases, the strict performance of any of the terms, covenants, conditions, or provisions of this Contract shall not be construed as a waiver or relinquishment of any term, covenant, condition, or provision. No term or condition of this Contract shall be held to be waived, modified, or deleted except by a written amendment signed by the Parties.
15. Independent Contractor. The Parties shall not act as employees, partners, joint venturers, or associates of one another. The Parties are independent contracting entities. Nothing in this Contract shall be construed to create an employer/employee relationship or to allow either Party to exercise control or direction over the manner or method by which the other transacts its business affairs or provides its usual services. The employees or agents of one Party are not employees or agents of the other Party.
16. Patient Protection and Affordable Care Act. The Contractor agrees that it will be responsible for compliance with the Patient Protection and Affordable Care Act ("PPACA") with respect to itself and its employees, including any obligation to report health insurance coverage, provide health insurance coverage, or pay any financial assessment, tax, or penalty for not providing health insurance. The Contractor shall indemnify the State and hold it harmless from any costs to the State arising from Contractor's failure to fulfill its PPACA responsibilities for itself or its employees.
17. Limitation of State's Liability. The State shall have no liability except as specifically provided in this Contract. In no event will the State be liable to the Contractor or any other party for any lost revenues, lost profits, loss of business, decrease in the value of any securities or cash position, time, goodwill, or any indirect, special, incidental, punitive, exemplary or consequential damages of any nature, whether based on warranty, contract, statute, regulation, tort (including but not limited to negligence), or any other legal theory that may arise under this Contract or otherwise. Notwithstanding anything else herein, the State's total liability under this Contract (including without limitation any exhibits, schedules, amendments or other attachments to the Contract) or otherwise shall under no circumstances exceed the Estimated Liability. This limitation of liability is cumulative and not per incident.

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Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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18. Limitation of Contractor's Liability. In accordance with Tenn. Code Ann. § 12-3-701, the Contractor's liability for all claims arising under this Contract shall be limited to an amount equal to two (2) times the Estimated Liability amount detailed in Special Terms and Conditions #2. and as may be amended, PROVIDED THAT in no event shall this Section limit the liability of the Contractor for: (i) intellectual property or any Contractor Indemnity obligations for infringement for third-party intellectual property rights; (ii) any claims covered by any specific provision in the Contract providing for liquidated damages; or (iii) any claims for intentional torts, criminal acts, fraudulent conduct, or acts or omissions that result in personal injuries or death.
19. Hold Harmless. Contractor shall indemnify, defend (to the extent permitted by law and the Indemnified Party's legal counsel), and hold harmless an Indemnified Party from any third party claims or causes of action, including attorney's fees, from the performance of the Master Agreement by the Contractor or its agents, employees, or subcontractors resulting in bodily injury (including death) or damage to real or tangible personal property.

The indemnification obligations of this section do not apply in the event the claim or cause of action is the result of the Indemnified Party's sole negligence. This clause will not be construed to bar any legal remedies the Contractor may have for the Indemnified Party's failure to fulfill its obligation under this Contract.

In the event of any suit or claim, the Parties shall give each other prompt notice and provide all necessary assistance to respond. The failure of the State to give notice shall only relieve the Contractor of its obligations under this Section to the extent that the Contractor can demonstrate actual prejudice arising from the failure to give notice. This Section shall not grant the Contractor, through its attorneys, the right to represent the State in any legal matter, as the right to represent the State is governed by Tenn. Code Ann. § 8-6-106.

20. [Reserved]
21. Tennessee Consolidated Retirement System. Subject to statutory exceptions contained in Tenn. Code Ann. §§ 8-36-801, *et seq.*, the law governing the Tennessee Consolidated Retirement System ("TCRS"), provides that if a retired member of TCRS, or of any superseded system administered by TCRS, or of any local retirement fund established under Tenn. Code Ann. §§ 8-35-101, *et seq.*, accepts State employment, the member's retirement allowance is suspended during the period of the employment. Accordingly and notwithstanding any provision of this Contract to the contrary, the Contractor agrees that if it is later determined that the true nature of the working relationship between the Contractor and the State under this Contract is that of "employee/employer" and not that of an independent contractor, the Contractor, if a retired member of TCRS, may be required to repay to TCRS the amount of retirement benefits the Contractor received from TCRS during the Term.
22. Tennessee Department of Revenue Registration. The Contractor shall comply with all applicable registration requirements contained in Tenn. Code Ann. §§ 67-6-601 – 608. Compliance with applicable registration requirements is a material requirement of this Contract.
23. Debarment and Suspension. The Contractor certifies, to the best of its knowledge and belief, that it, its current and future principals, its current and future subcontractors and their principals:

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Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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- a. are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any federal or state department or agency;
- b. have not within a three (3) year period preceding this Contract been convicted of, or had a civil judgment rendered against them from commission of fraud, or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or grant under a public transaction; violation of federal or state antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property;
- c. are not presently indicted or otherwise criminally or civilly charged by a government entity (federal, state, or local) with commission of any of the offenses detailed in section b. of this certification; and
- d. have not within a three (3) year period preceding this Contract had one or more public transactions (federal, state, or local) terminated for cause or default.

The Contractor shall provide prompt written notice to the State if at any time it learns that there was an earlier failure to disclose information or that due to changed circumstances, its principals or the principals of its subcontractors are excluded, disqualified, or presently fall under any of the prohibitions of sections a-d.

24. Force Majeure. "Force Majeure Event" means fire, flood, earthquake, elements of nature or acts of God, wars, riots, civil disorders, rebellions or revolutions, acts of terrorism or any other similar cause beyond the reasonable control of the Party except to the extent that the non-performing Party is at fault in failing to prevent or causing the default or delay, and provided that the default or delay cannot reasonably be circumvented by the non-performing Party through the use of alternate sources, workaround plans or other means. A strike, lockout or labor dispute shall not excuse either Party from its obligations under this Contract. Except as set forth in this Section, any failure or delay by a Party in the performance of its obligations under this Contract arising from a Force Majeure Event is not a default under this Contract or grounds for termination. The non-performing Party will be excused from performing those obligations directly affected by the Force Majeure Event, and only for as long as the Force Majeure Event continues, provided that the Party continues to use diligent, good faith efforts to resume performance without delay. The occurrence of a Force Majeure Event affecting Contractor's representatives, suppliers, subcontractors, customers or business apart from this Contract is not a Force Majeure Event under this Contract. Contractor will promptly notify the State of any delay caused by a Force Majeure Event (to be confirmed in a written notice to the State within two (2) days of the inception of the delay) that a Force Majeure Event has occurred, and will describe in reasonable detail the nature of the Force Majeure Event. If any Force Majeure Event results in a delay in Contractor's performance longer than five (5) days, the State may, upon notice to Contractor: (a) cease payment of the fees for the affected obligations until Contractor resumes performance of the affected obligations; or (b) immediately terminate this Contract or any purchase order, in whole or in part, without further payment except for fees then due and payable. Contractor will not increase its charges under this Contract or charge the State any fees other than those provided for in this Contract as the result of a Force Majeure Event.
25. State and Federal Compliance. The Contractor shall comply with all State and federal laws and regulations applicable to Contractor in the Contractor's performance of this Contract.
26. Governing Law. This Contract shall be governed by and construed in accordance with the laws of the State of Tennessee, without regard to its conflict or choice of law rules. The Tennessee Claims

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Commission or the state or federal courts in Tennessee shall be the venue for all claims, disputes, or disagreements arising under this Contract. The Contractor acknowledges and agrees that any rights, claims, or remedies against the State of Tennessee or its employees arising under this Contract shall be subject to and limited to those rights and remedies available under Tenn. Code Ann. §§ 9-8-101 - 408.

27. Entire Agreement. This Contract, including any incorporated agreements, is complete and contains the entire understanding between the Parties relating to its subject matter, including all the terms and conditions of the Parties' agreement. This Contract supersedes any and all prior understandings, representations, negotiations, and agreements between the Parties, whether written or oral.
28. Severability. If any terms and conditions of this Contract are held to be invalid or unenforceable as a matter of law, the other terms and conditions of this Contract shall not be affected and shall remain in full force and effect. The terms and conditions of this Contract are severable.
29. Headings. Section headings of this Contract are for reference purposes only and shall not be construed as part of this Contract.
30. Incorporation of Additional Documents. Each of the following documents is included as a part of this Contract by reference. In the event of a discrepancy or ambiguity regarding the Contractor's duties, responsibilities, and performance under this Contract, these items shall govern in order of precedence below:
  - a. any amendment to this Contract, with the latter in time controlling over any earlier amendments;
  - b. this Contract with any attachments or exhibits (excluding the items listed at subsections c. through f., below), which includes Attachments A-F;
  - c. any clarifications of or addenda to the Contractor's proposal seeking this Contract;
31. Iran Divestment Act. The requirements of Tenn. Code Ann. § 12-12-101, *et seq.*, addressing contracting with persons as defined at Tenn. Code Ann. §12-12-103(5) that engage in investment activities in Iran, shall be a material provision of this Contract. The Contractor certifies, under penalty of perjury, that to the best of its knowledge and belief that it is not on the list created pursuant to Tenn. Code Ann. § 12-12-106.
32. Insurance. Contractor shall maintain insurance coverage as specified in this Section. The State reserves the right to amend or require additional insurance coverage, coverage amounts, and endorsements required under this Contract. Contractor's failure to maintain or submit evidence of insurance coverage, as required, is a material breach of this Contract. If Contractor loses insurance coverage, fails to renew coverage, or for any reason becomes uninsured during the Term, Contractor shall immediately notify the State. All insurance companies providing coverage must be: (a) acceptable to the State; (b) authorized by the Tennessee Department of Commerce and Insurance ("TDCI"); and (c) rated A- / VII or better by A.M. Best. All coverage must be on a primary basis and noncontributory with any other insurance or self-insurance carried by the State. Contractor agrees to name the State as an additional insured on any insurance policy with the exception of workers' compensation (employer liability) and professional liability (errors and omissions) insurance. All policies must contain an endorsement for a waiver of subrogation in favor of the State. Any deductible or self insured retention ("SIR") over fifty thousand dollars (\$50,000) must be approved by the State. The deductible or SIR and any premiums are the Contractor's sole responsibility. The Contractor agrees that the insurance requirements specified in this Section do not reduce any liability the Contractor has assumed under this Contract including any indemnification or hold harmless requirements.

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To achieve the required coverage amounts, a combination of an otherwise deficient specific policy and an umbrella policy with an aggregate meeting or exceeding the required coverage amounts is acceptable. For example: If the required policy limit under this Contract is for two million dollars (\$2,000,000) in coverage, acceptable coverage would include a specific policy covering one million dollars (\$1,000,000) combined with an umbrella policy for an additional one million dollars (\$1,000,000). If the deficient underlying policy is for a coverage area without aggregate limits (generally Automobile Liability and Employers' Liability Accident). In the event that an umbrella policy is being provided to achieve any required coverage amounts, the umbrella policy shall be accompanied by an endorsement at least as broad as the Insurance Services Office, Inc. (also known as "ISO") "Noncontributory—Other Insurance Condition" endorsement or shall be written on a policy form that addresses both the primary and noncontributory basis of the umbrella policy if the State is otherwise named as an additional insured.

Contractor shall provide the State a certificate of insurance ("COI") evidencing the coverages and amounts specified in this Section. The COI must be on a form approved by the TDCI (standard ACORD form preferred). The COI must list each insurer's National Association of Insurance Commissioners (NAIC) number and be signed by an authorized representative of the insurer. The COI must list the State of Tennessee – CPO Risk Manager, 312 Rosa L. Parks Ave., 3<sup>rd</sup> floor Central Procurement Office, Nashville, TN 37243 as the certificate holder. Contractor shall provide the COI ten (10) business days prior to the Effective Date and again thirty (30) calendar days before renewal or replacement of coverage. Contractor shall provide the State evidence that all subcontractors maintain the required insurance or that subcontractors are included under the Contractor's policy. At any time, the State may require Contractor to provide a valid COI. The Parties agree that failure to provide evidence of insurance coverage as required is a material breach of this Contract. If Contractor self-insures, then a COI will not be required to prove coverage. Instead Contractor shall provide a certificate of self-insurance or a letter, on Contractor's letterhead, detailing its coverage, policy amounts, and proof of funds to reasonably cover such expenses. The State reserves the right to require complete copies of all required insurance policies, including endorsements required by these specifications, at any time.

The State agrees that it shall give written notice to the Contractor as soon as practicable after the State becomes aware of any claim asserted or made against the State, but in no event later than thirty (30) calendar days after the State becomes aware of such claim. The failure of the State to give notice shall only relieve the Contractor of its obligations under this Section to the extent that the Contractor can demonstrate actual prejudice arising from the failure to give notice. This Section shall not grant the Contractor or its insurer, through its attorneys, the right to represent the State in any legal matter, as the right to represent the State is governed by Tenn. Code Ann. § 8-6-106.

**The insurance obligations under this Contract shall be: (1)—all the insurance coverage and policy limits carried by the Contractor; or (2)—the minimum insurance coverage requirements and policy limits shown in this Contract; whichever is greater. Any insurance proceeds in excess of or broader than the minimum required coverage and minimum required policy limits, which are applicable to a given loss, shall be available to the State. No representation is made that the minimum insurance requirements of the Contract are sufficient to cover the obligations of the Contractor arising under this Contract. The Contractor shall obtain and maintain, at a minimum, the following insurance coverages and policy limits.**

- a. Commercial General Liability ("CGL") Insurance
  - 1) The Contractor shall maintain CGL, which shall be written on an ISO Form CG 00 01 occurrence form (or a substitute form providing equivalent coverage) and shall cover liability arising from property damage, premises and operations products and completed

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operations, bodily injury, personal and advertising injury, and liability assumed under an insured contract (including the tort liability of another assumed in a business contract).

The Contractor shall maintain single limits not less than one million dollars (\$1,000,000) per occurrence. If a general aggregate limit applies, either the general aggregate limit shall apply separately to this policy or location of occurrence or the general aggregate limit shall be twice the required occurrence limit.

- b. Workers' Compensation and Employer Liability Insurance
  - 1) For Contractors statutorily required to carry workers' compensation and employer liability insurance, the Contractor shall maintain:
    - i. Workers' compensation in an amount not less than one million dollars (\$1,000,000) including employer liability of one million dollars (\$1,000,000) per accident for bodily injury by accident, one million dollars (\$1,000,000) policy limit by disease, and one million dollars (\$1,000,000) per employee for bodily injury by disease.
  - 2) If the Contractor certifies that it is exempt from the requirements of Tenn. Code Ann. §§ 50-6-101 – 103, then the Contractor shall furnish written proof of such exemption for one or more of the following reasons:
    - i. The Contractor employs fewer than five (5) employees;
    - ii. The Contractor is a sole proprietor;
    - iii. The Contractor is in the construction business or trades with no employees;
    - iv. The Contractor is in the coal mining industry with no employees;
    - v. The Contractor is a state or local government; or
    - vi. The Contractor self-insures its workers' compensation and is in compliance with the TDCI rules and Tenn. Code Ann. § 50-6-405.
- c. Automobile Liability Insurance
  - 1) The Contractor shall maintain automobile liability insurance which shall cover liability arising out of any automobile (including owned, leased, hired, and non-owned automobiles).
  - 2) The Contractor shall maintain bodily injury/property damage with a limit not less than one million dollars (\$1,000,000) per occurrence or combined single limit.
- d. Crime Insurance
  - 1) The Contractor shall maintain crime insurance, which shall be written on a "loss sustained form" or "loss discovered form" providing coverage for third party fidelity, The policy must allow for reporting of circumstances or incidents that may give rise to future claims, include an extended reporting period of no less than ninety (90) days with respect to events which occurred but were not reported during the term of the policy, and not contain a condition requiring an arrest or conviction, but the discovery period terminates upon the inception of replacement crime insurance

Any crime insurance policy shall have a limit not less than one million dollars (\$1,000,000) per claim and one million dollars (\$1,000,000) in the aggregate. Any crime insurance policy shall contain a Social Engineering Fraud Endorsement with a limit of not less than two hundred and fifty thousand dollars (\$250,000). This insurance may be written on a claims-made basis, but in the event that coverage is cancelled or non-renewed.

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33. Major Procurement Contract Sales and Use Tax. Pursuant to Tenn. Code Ann. § 4-39-102 and to the extent applicable, the Contractor and the Contractor's subcontractors shall remit sales and use taxes on the sales of goods or services that are made by the Contractor or the Contractor's subcontractors and that are subject to tax.
34. Confidentiality of Records. Strict standards of confidentiality of records and information shall be maintained in accordance with applicable state and federal law. All material and information, regardless of form, medium or method of communication, provided to the Contractor by the State or acquired by the Contractor on behalf of the State that is regarded as confidential under state or federal law shall be regarded as "Confidential Information." Nothing in this Section shall permit Contractor to disclose any Confidential Information. Confidential Information shall not be disclosed except as required or permitted under state or federal law. Contractor shall take all necessary steps to safeguard the confidentiality of such material or information in conformance with applicable state and federal law. The obligations set forth in this Section shall survive the termination of this Contract for so long as confidential information is retained.
35. Boycott of Israel. The Contractor certifies that it is not currently engaged in, and covenants that it will not, for the duration of the Contract, engage in a Boycott of Israel, as that term is defined in Tenn. Code Ann. § 12-4-119.
36. Prohibited Contract Terms. The prohibited contract terms and conditions enumerated in Pub. Ch. 113, § 5, shall be a material provision of this Contract. The Contractor acknowledges, understands, and agrees that the inclusion of a term or condition prohibited by Pub. Ch. 113, § 5, shall be null and void and the Contract shall be enforceable as if the Contract did not contain such term or condition.

**Special Terms and Conditions**

1. Conflicting Terms and Conditions. Should any of these special terms and conditions conflict with any other terms and conditions of this Contract, the special terms and conditions shall be subordinate to the Contract's other terms and conditions.
2. Estimated Liability. The total purchases of any goods or services under the Contract are not known. The State estimates the purchases during the Term shall be seventeen million (\$17,000,000.00) ("Estimated Liability"). This Contract does not grant the Contractor any exclusive rights. The State does not guarantee that it will buy any minimum quantity of goods or services under this Contract. Subject to the terms and conditions of this Contract, the Contractor will only be paid for goods or services provided under this Contract after a purchase order is issued to Contractor by the State or as otherwise specified by this Contract.
3. Payment Methodology. The Contractor shall be compensated based on the payment methodology for goods or services authorized by the State in a total amount as set forth in Special Terms and Conditions #2 above and which is based on the NASPO Valuepoint reseller catalog found at:

<https://www.naspo.valuepoint.org/portfolio/computer-equipment-peripherals-related-services-2023-2028/lenovo-united-states-inc/>

<https://techtoday.lenovo.com/us/en/naspo>

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4. Travel Compensation. The Contractor shall not be compensated or reimbursed for travel time, travel expenses, meals, or lodging.
5. Statement of Work. Professional Services shall be secured through a Statement of Work (SOW) (See Attachment D) executed between the Contractor and the State Agency or Purchasing Entity. This SOW constitutes an Order under this Participating Addendum NASPO COMPUTER EQUIPMENT, PERIPHERALS & RELATED SERVICES SWC3014, (the "Contract") and incorporates by reference the terms and conditions, specifications, and other incorporated contract documents of the Contract. In case of any conflict between the SOW and the Contract, the Contract shall prevail.
6. Invoice Requirements. The Contractor shall invoice the State only after completion of all work, described in this Contract, and present invoices no more often than monthly, with all necessary supporting documentation, to:

State Agency Billing Address

- a. Each invoice, on Contractor's letterhead, shall clearly and accurately detail all of the following information (calculations must be extended and totaled correctly):
  - (1) Invoice number (assigned by the Contractor);
  - (2) Invoice date;
  - (3) Contract number (assigned by the State);
  - (4) Customer account name: State Agency & Division Name;
  - (5) Customer account number (assigned by the Contractor to the above-referenced Customer);
  - (6) Contractor name;
  - (7) Contractor Tennessee Edison registration ID number;
  - (8) Contractor contact for invoice questions (name, phone, or email);
  - (9) Contractor remittance address;
  - (10) Description of delivered goods or services provided and invoiced, including identifying information as applicable; and
  - (11) Total amount due for delivered goods or services provided (as stipulated in Special Terms and Conditions #2 above).
- b. The Contractor understands and agrees that an invoice under this Contract shall:
  - (1) only include charges for goods delivered or services provided as described in this Contract and in accordance with payment terms and conditions set forth in Special Terms and Conditions #3;
  - (2) only be submitted for goods delivered or services completed and shall not include any charge for future goods to be delivered or services to be performed;
  - (3) not include Contractor's taxes which includes without limitation Contractor's sales and use tax, excise taxes, franchise taxes, real or personal property taxes, or income taxes; and
  - (4) begin the timeframe for payment (and any discounts) only when the State is in receipt of the invoice, and the invoice meets the minimum requirements of this Special Terms and Conditions #6.

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7. Deductions. The State reserves the right to deduct from amounts, which are or shall become due and payable to the Contractor under this or any contract between the Contractor and the State of Tennessee, any amounts that are or shall become due and payable to the State of Tennessee by the Contractor.
8. Prerequisite Documentation. The Contractor shall not invoice the State under this Contract until the State has received the following, properly completed documentation.
  - a. The Contractor shall complete, sign, and present to the State the "Authorization Agreement for Automatic Deposit Form" provided by the State. By doing so, the Contractor acknowledges and agrees that, once this form is received by the State, payments to the Contractor, under this or any other contract the Contractor has with the State of Tennessee, may be made by ACH; and
  - b. The Contractor shall complete, sign, and return to the State the State-provided W-9 form. The taxpayer identification number on the W-9 form must be the same as the Contractor's Federal Employer Identification Number or Social Security Number referenced in the Contractor's Edison registration information.
9. Reserved
10. Intellectual Property Indemnity. The Contractor agrees to indemnify and hold harmless the State of Tennessee as well as its officers, agents, and employees from and against any and all third party claims or suits which may be brought against the State concerning or arising out of any claim of an alleged patent, copyright, trade secret or other intellectual property infringement in accordance with Section 34(b) (Intellectual Property Indemnification) of the Master Agreement.
11. Additional lines, items, or options. At its sole discretion, the State may make written requests to the Contractor to add lines, items, or options that are needed and within the Scope but were not included in the original Contract. Such lines, items, or options will be added to the Contract through a Memorandum of Understanding ("MOU"), not an amendment.
  - a. After the Contractor receives a written request to add lines, items, or options, the Contractor shall have ten (10) business days to respond with a written proposal. The Contractor's written proposal shall include:
    - 1) The effect, if any, of adding the lines, items, or options on the other goods or services required under the Contract;
    - 2) Any pricing related to the new lines, items, or options;
    - 3) The expected effective date for the availability of the new lines, items, or options; and
    - 4) Any additional information requested by the State.
  - b. The State may negotiate the terms of the Contractor's proposal by requesting revisions to the proposal.
  - c. To indicate acceptance of a proposal, the State will sign it. The signed proposal shall constitute a MOU between the Parties, and the lines, items, or options shall be incorporated into the Contract as if set forth verbatim.
  - d. Only after a MOU has been executed by the State and Contractor shall the Contractor perform or deliver the new lines, items, or options.
12. [Reserved]
13. [Reserved]

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14. Extraneous Terms and Conditions. Contractor shall fill all orders submitted by the State under this Contract. Except as allowed by the Master Agreement or this Contract, no purchase order, invoice, or other documents associated with any sales, orders, or supply of any good or service under this Contract shall contain any terms or conditions other than as set forth in the Contract. Any such extraneous terms and conditions shall be void, invalid and unenforceable against the State except as allowed by the Master Agreement or this Contract and agreed to in writing signed by the parties.
  
15. Other Requirements.
  - a. Minimum Requirements
    - (1) The Contractor and all data centers used by the Contractor to host State data, including those of all Subcontractors, must comply with the State's Enterprise Information Security Policies as amended periodically. The State's Enterprise Information Security Policies document is found at the following URL:  
<https://www.tn.gov/finance/strategic-technology-solutions/strategic-technology-solutions/sts-security-policies.html>.
    - (2) The Contractor agrees to maintain the Application so that it will run on a current, manufacturer-supported Operating System. "Operating System" shall mean the software that supports a computer's basic functions, such as scheduling tasks, executing applications, and controlling peripherals.
    - (3) If the Application requires middleware or database software, Contractor shall maintain middleware and database software versions that are at all times fully compatible with current versions of the Operating System and Application to ensure that security vulnerabilities are not introduced.
  
16. Prohibited Advertising or Marketing. The Contractor shall not suggest or imply in advertising or marketing materials that Contractor's goods or services are endorsed by the State. The restrictions on Contractor advertising or marketing materials under this Section shall survive the termination of this Contract.
  
17. Public Accountability. If the Contractor is subject to Tenn. Code Ann. §§ 8-4-401, *et seq.*, or if this Contract involves the provision of services to citizens by the Contractor on behalf of the State, the Contractor agrees to establish a system through which recipients of services may present grievances about Contractor's operation of the service program. The Contractor shall also display in a prominent place, located near the passageway through which the public enters in order to receive contract-supported services, a sign at least eleven inches (11") in height and seventeen inches (17") in width stating the following:

NOTICE: THIS AGENCY IS A RECIPIENT OF TAXPAYER FUNDING. IF YOU OBSERVE AN AGENCY DIRECTOR OR EMPLOYEE ENGAGING IN ANY ACTIVITY THAT YOU CONSIDER TO BE ILLEGAL, IMPROPER, OR WASTEFUL, PLEASE CALL THE STATE COMPTROLLER'S TOLL-FREE HOTLINE: 1-800-232-5454

The sign shall be of the form prescribed by the Comptroller of the Treasury. The contracting state agency shall request copies of the sign from the Comptroller of the Treasury and provide signs to contractors.

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18. Contractor Commitment to Diversity. The Contractor shall comply with and make reasonable business efforts to exceed the commitment to diversity represented by the Contractor's Response to Attachment B: Diversity Letter and resulting in this Contract.

The Contractor shall assist the State in monitoring the Contractor's performance of this commitment by providing, as requested, a monthly report of participation in the performance of this Contract by small business enterprises and businesses owned by minorities, women, service-disabled veterans, and persons with disabilities. Such reports shall be provided to the State of Tennessee Governor's Office of Diversity Business Enterprise in the TN Diversity Software available online at:  
<https://tn.diversitysoftware.com/FrontEnd/StartCertification.asp?TN=tn&XID=9810>

19. Unencumbered Personnel. The Contractor shall not restrict its employees, agents, subcontractors or principals who perform services for the State under this Contract from performing the same or similar services for the State after the termination of this Contract, either as a State employee, an independent contractor, or an employee, agent, subcontractor or principal of another contractor with the State.
20. Personally Identifiable Information. While performing its obligations under this Contract, Contractor may have access to Personally Identifiable Information held by the State ("PII"). For the purposes of this Contract, "PII" includes "Nonpublic Personal Information" as that term is defined in Title V of the Gramm-Leach-Bliley Act of 1999 or any successor federal statute, and the rules and regulations thereunder, all as may be amended or supplemented from time to time ("GLBA") and personally identifiable information and other data protected under any other applicable laws, rule or regulation of any jurisdiction relating to disclosure or use of personal information ("Privacy Laws"). Contractor agrees it shall not do or omit to do anything which would cause the State to be in breach of any Privacy Laws. Contractor shall, and shall cause its employees, agents and representatives to: (i) keep PII confidential and may use and disclose PII only as necessary to carry out those specific aspects of the purpose for which the PII was disclosed to Contractor and in accordance with this Contract, GLBA and Privacy Laws; and (ii) implement and maintain appropriate technical and organizational measures regarding information security to: (A) ensure the security and confidentiality of PII; (B) protect against any threats or hazards to the security or integrity of PII; and (C) prevent unauthorized access to or use of PII. Contractor shall without undue delay notify State: (1) of any disclosure or use of any PII by Contractor or any of its employees, agents and representatives in breach of this Contract; and (2) of any disclosure of any PII to Contractor or its employees, agents and representatives where the purpose of such disclosure is not known to Contractor or its employees, agents and representatives. The State reserves the reasonable right to review Contractor's applicable policies and procedures used to maintain the security and confidentiality of PII and Contractor shall, and cause its employees, agents and representatives to, comply with all reasonable requests or directions from the State to enable the State to verify or ensure that Contractor is in full compliance with its obligations under this Contract in relation to PII. Upon termination or expiration of the Contract or at the State's direction at any time in its sole discretion, whichever is earlier, Contractor shall without undue delay return to the State any and all PII which it has received under this Contract and, unless otherwise required by applicable law, shall destroy all records of such PII.

The Contractor shall report to the State any instances of unauthorized access to or potential disclosure of PII in the custody or control of Contractor ("Unauthorized Disclosure") that come to the Contractor's attention. Any such report shall be made by the Contractor within forty-eight (48) hours after the Unauthorized Disclosure has come to the attention of the Contractor. Contractor shall take all necessary measures to halt any further Unauthorized Disclosures. The Contractor, at the sole discretion of the State, shall provide no cost credit monitoring services for individuals whose PII was affected by an

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Unauthorized Disclosure found to have been due to an act or omission of the Contractor. The Contractor shall bear the cost of notification to all individuals affected by an Unauthorized Disclosure found to have been due to an act or omission of the Contractor, including individual letters and public notice. The remedies set forth in this Section are not exclusive and are in addition to any claims or remedies available to this State under this Contract or otherwise available at law. The obligations set forth in this Section shall survive the termination of this Contract.

21. Statewide Contract. This Contract establishes a source or sources of supply for all Tennessee State Agencies. "Tennessee State Agency" refers to the various departments, institutions, boards, commissions, and agencies of the executive branch of government of the State of Tennessee with exceptions as addressed in Tenn. Comp. R. & Regs. 0690-03-01-.01. The Contractor shall provide all goods or services and deliverables as required by this Contract to all Tennessee State Agencies. The Contractor shall make this Contract available to the following entities, who are authorized to and who may purchase off of this Statewide Contract ("Authorized Users"):
- a. all Tennessee State governmental entities (this includes the legislative branch; judicial branch; and, commissions and boards of the State outside of the executive branch of government);
  - b. Tennessee local governmental agencies;
  - c. members of the University of Tennessee or Tennessee Board of Regents systems;
  - d. any private nonprofit institution of higher education chartered in Tennessee; and,
  - e. any corporation which is exempted from taxation under 26 U.S.C. Section 501(c) (3), as amended, and which contracts with the Department of Mental Health and Substance Abuse to provide services to the public (Tenn. Code Ann. § 33-2-1001).

These Authorized Users may utilize this Contract by purchasing directly from the Contractor according to their own procurement policies and procedures. The State is not responsible or liable for the transactions between the Contractor and Authorized Users.

22. Statewide Contract Reports. All reports shall be submitted electronically in Microsoft Excel format. Reports shall include the ability to sort or summarize data in accordance with the Contract Administrator's specifications. All reports shall be provided at no additional cost to the State.

Quarterly Reports: Contractor(s) will submit quarterly reports to the Contract Administrator no later than ten (10) days after the end of the State's quarter (e.g. a fiscal year quarter 2 report for October - December is due no later than January 10th). At the Contract Administrator's sole discretion, the State may extend the time allowed to complete quarterly reports. Quarterly reports shall provide statistical data on all purchases under this Contract by Tennessee State Agencies and Authorized Users. At minimum, the quarterly report's statistical data shall be detailed and broken down by line item to include:

1. Edison contract number
2. Contract line item number
3. Invoice date
4. Invoice number
5. Supplier part number
6. Item or bundle description
7. Quantity purchased
8. Unit of measure
9. Unit of measure description
10. Name of State Agency or Authorized User
11. Identity of purchaser: State entity or non-State entity
12. State Agency location
13. Unit/Contract price per line item

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14. List price as listed in supplier's catalog if catalog item
15. Subtotals for each category above
16. Grand totals for each category above

Custom Reports: When requested by the State, the Contractor shall submit custom reports to the Contract Administrator within thirty (30) days of the request.

23. Survival. The terms, provisions, representations, and warranties contained in this Contract which by their sense and context are intended to survive the performance and termination of this Contract, shall so survive the completion of performance and termination of this Contract.
24. Inspection and Acceptance. The State shall have the right to inspect all goods or services provided by Contractor under this Contract. If, upon inspection, the State determines that the goods or services are Defective, the State shall notify Contractor, and Contractor shall re-deliver the goods or provide the services at no additional cost to the State. If after a period of thirty (30) days following delivery of goods or performance of services the State does not provide a notice of any Defects, the goods or services shall be deemed to have been accepted by the State.
25. Term of Contract. This Contract shall be effective for the period beginning on February 1, 2024 ("Effective Date") and ending on June 30, 2025. The State shall have no obligation for goods or services provided by the Contractor prior to the Effective Date.
26. Renewal Options. This Contract may be renewed upon satisfactory completion of the Term. The State reserves the right to execute up to two (2) renewal options under the same terms and conditions for a period not to exceed twelve (12) months each by the State, at the State's sole option. In no event, however, shall the maximum Term, including all renewals or extensions, exceed a total of sixty (60) months.
27. Term Extension. The State may extend the Term an additional period of time, not to exceed one hundred-eighty (180) days beyond the expiration date of this Contract, under the same terms and conditions, at the State's sole option. In no event, however, shall the maximum Term, including all renewals or extensions, exceed a total of sixty (60) months.
28. [Reserved] Warranty. See section 21 of the Master Agreement. The applicable warranty period shall be specified on the applicable quote or order.
29. State and Federal Compliance. The Contractor shall comply with all State and federal laws and regulations applicable to Contractor in the Contractor's performance of this Contract.
30. Administrative Fees. The Contractor shall pay the State an Administrative Fee of one (1) percent (1.0% or 0.01) in accordance with the Terms and Conditions of the Master Agreement no later than 60 days following the end of each calendar quarter. The State's Administrative Fee shall be submitted quarterly and is based on sales of products and services (less any charges for taxes or shipping).

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<b>Period End</b>	<b>Admin Fee Due</b>
March 31	May 31
June 30	August 31
September 30	November 30
December 31	February 28

The administrative fee shall be submitted to the following address:

Michael Winston, Director of Financial Management  
Department of General Services  
W.R. Snodgrass TN. Tower 22 Floor  
312 Rosa L. Parks Avenue  
Nashville, TN 37243

**LETTER OF DIVERSITY COMMITMENT**

**Lenovo (United States) Inc.**  
8001 Development Drive, Morrisville, NC 27560  
1/25/2024

State of Tennessee,

Lenovo (United States) Inc. is committed to achieving or surpassing a goal of 0% percent spend with certified diversity business enterprise firms on State of Tennessee contract # (Edison document #). Diversity businesses are defined as those that are owned by minority, women, service-disabled veterans, businesses owned by persons with disabilities, and small businesses which are certified by the Governor's Office of Diversity Business Enterprise (Go-DBE).

We confirm our commitment of (percentage) participation on the (Contract) by using the following Diversity businesses:

- (i) Name and ownership characteristics (i.e., ethnicity, gender, service-disabled veteran, or disability) of anticipated diversity subcontractors and suppliers:

N/A

- (ii) Participation estimates (expressed as a percent of the total contract value to be dedicated to diversity subcontractors and suppliers):

0 %.

- (iii) Description of anticipated services to be performed by diversity subcontractors and suppliers:

N/A

---

We accept that our commitment to diversity advances the State's efforts to expand opportunity of diversity businesses to do business with the State as contractors and sub-contractors.

Further, we commit to:

1. Using applicable reporting tools that allow the State to track and report purchases from businesses owned by minority, women, service-disabled veterans, businesses owned by persons with disabilities, and small businesses.
2. Reporting monthly to the Go-DBE office the dollars spent with certified diversity businesses owned by minority, women, service-disabled veterans, businesses owned by persons with disabilities, and small business accomplished under contract # (Edison number).

**Participating Addendum Number 81353 for  
NASPO COMPUTER EQUIPMENT, PERIPHERALS & RELATED SERVICES**  
Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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Lenovo (United States) Inc. is committed to working with the Go-DBE office to accomplish this goal.

Regards,



Anthony Pichardo  
Executive Director

Participating Addendum Number 81353 for  
NASPO COMPUTER EQUIPMENT, PERIPHERALS & RELATED SERVICES  
Between STATE OF TENNESSEE and Lenovo (United States) Inc.

**ATTACHMENT C**

**ATTESTATION RE PERSONNEL USED IN CONTRACT PERFORMANCE**

SUBJECT CONTRACT NUMBER:	81353
CONTRACTOR LEGAL ENTITY NAME:	Lenovo (United States) Inc.
EDISON VENDOR IDENTIFICATION NUMBER:	152364

The Contractor, identified above, does hereby attest, certify, warrant, and assure that the Contractor shall not knowingly utilize the services of an illegal immigrant in the performance of this Contract and shall not knowingly utilize the services of any subcontractor who will utilize the services of an illegal immigrant in the performance of this Contract.



**CONTRACTOR SIGNATURE**

NOTICE: This attestation MUST be signed by an individual empowered to contractually bind the Contractor. Attach evidence documenting the individual's authority to contractually bind the Contractor, unless the signatory is the Contractor's chief executive or president.

Anthony Pichardo, Executive Director

**PRINTED NAME AND TITLE OF SIGNATORY**

1/25/24

**DATE OF ATTESTATION**

***NASPO COMPUTER EQUIPMENT, PERIPHERALS  
& RELATED SERVICES SWC3014***  
*[Insert Requesting State Agency name]*  
**Statement of Work**



**For**

*[Insert Project Title]*

*[Insert Planview Work ID - Sequential #]*

*[Date]*

**Participating Addendum Number 81353 for  
NASPO COMPUTER EQUIPMENT, PERIPHERALS & RELATED SERVICES**  
Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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## 1.0 Statement of Work

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### 1.1 Project Title

This Statement of Work (SOW) is being executed between *[insert Contractor name]* ("Contractor") and *[insert Agency]* ("Agency" or "Purchasing Entity") for *[insert a brief description of the project]*, effective as of *[insert Effective Date]* (the "SOW Effective Date").

This Statement of Work (SOW) constitutes an Order under that certain *[Contract or Participating Addendum]* between *[contractor name]* and the State of Tennessee, *[contract name and number]*, (the "Contract") and incorporates by reference the terms and conditions, specifications, and other incorporated contract documents of the Contract. In case of any conflict between this SOW and the Contract, the Contract shall prevail.

### 1.2 Background

- *Describe the history of your project and the prior events that brought you to this SOW*

### 1.3 Reference to other applicable documents

The following documents are hereby incorporated by reference into this SOW:

- *List any pertinent documents or supporting materials pertaining to the SOW, if any, otherwise write "None".*

## 2.0 Agency Staffing and Roles

---

### 2.1 Staffing

#### Project Manager – Agency

The Agency's Project Manager is:

Name:

**Participating Addendum Number 81353 for  
NASPO COMPUTER EQUIPMENT, PERIPHERALS & RELATED SERVICES**

Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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*Address:*

*City:*

*State & Zip*

*Phone:*

*Cell:*

*Fax:*

*Email:*

*Insert contact information for any additional relevant staff.*

## **2.2 Agency Staff and Roles**

- *Who within the agency will have decision-making authority, including approval of changes, report, documentation and deliverables?*
- *State agency staff (if any) to assist with the project effort*
- *Individuals key to the project and detail their roles and responsibilities*

## **3.0 Project Requirements and Deliverables**

---

### **3.1 Requirements**

*Describe:*

- *Tasks to be performed and any additional Contractor qualifications for specialized projects*
- *Any known non-standard work schedule tasks*
- *Location(s) where project work is required to be performed or may be performed, including the use of onsite, offsite, and offshore resources at the procuring State agency's discretion*
- *Include tasks that do not result in specific deliverables (i.e. project management)*
- *Include any security requirements from Special Terms and Conditions, Section 13 of the Contract that are applicable to this SOW.*

### **3.2 Agency Tasks and Responsibilities**

- *Include tasks to be performed by the agency*
- *Precise definition of all hardware, software, data services, and facilities the agency will provide*

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### 3.3 Deliverables

*Describe the Deliverables to be provided under this SOW, including the estimated delivery dates. If no Deliverables, state "none."*

### 3.4 Exclusions

*Describe:*

- *Tasks which are not part of the scope of this project*

## 4.0 Cost Criteria

---

### 4.1 Payment Methodology

*Describe the payment methodology and the associated charges applicable to this SOW. Pricing must reflect the original terms of the State contract.*

### 4.2 SOW Monetary Cap

Check one of the following to apply to this SOW:

- This SOW is a fixed fee SOW. The total charges under this SOW are [\_\_\_\_\_] dollars (\$\_\_\_\_) [*specify SOW monetary cap*] for the performance of the work as set forth in this SOW.
- This SOW is a time and materials SOW. The total charges under this SOW are [\_\_\_\_\_] dollars (\$\_\_\_\_) [*specify SOW monetary cap*] for the performance of the work as set forth in this SOW (the "SOW NTE Amount"). The Agency shall compensate the Contractor for actual work performed, in an amount not to exceed the SOW NTE Amount. The Agency shall not be obligated to pay for, and the Contractor shall not be obligated to perform, work under this SOW in excess of the SOW NTE Amount unless and until the parties execute a written amendment to this SOW to increase such SOW NTE Amount.

**Participating Addendum Number 81353 for  
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Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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- This SOW is a consumption-based SOW. The estimated charges under this SOW are [\_\_\_\_\_] dollars (\$\_\_\_\_) [specify SOW estimated budget]. For clarity, the terms of this SOW and the Contract will continue to apply to any Cloud Services provided in excess of the specified estimated charges.

#### 4.3 State Agency Billing Address

*Insert the applicable State Agency billing address.*

#### 5.0 Deliverable Acceptance

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*Define the process for submitting, approving and rejecting deliverables (including testing dates and scenarios)*

#### 6.0 Estimated Timeline and Period of Performance

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Project must begin no later than [Month, Year] and be completed by [Month, Year].

#### 7.0 Project Management (if applicable)

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*Describe what will be required as far as project management, which reports will be required, how often these reports will be required, and what must be submitted to the State procuring agency.*

#### 8.0 Additional State Policies and Standards

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*Specifically reference any additional state policies and standards that would apply, to the extent applicable to Contractor in its performance of the work under the Order. If none, write "none".*

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Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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- *Insert any other relevant links to the latest versions of the policies, standards and environment*

## 9.0 Key Assumptions

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*Identify any additional agency or contractor assumptions*

*If additional sections are required for your specific project, please leave the above section numbering as it is and add your new sections here as 10.0, 11.0 etc.*

This SOW will not be effective, and Contractor shall not commence services hereunder, until it is approved and signed by Contractor and the Participating Entity.

In witness whereof, the parties have executed this SOW as of the last date of execution of the signatories below.

<i>[Insert State Purchasing Agency]</i>	<i>[Contractor Name]</i>
Signature:	Signature:
Name:	Name:
Title:	Title:
Date:	Date:

**Participating Addendum Number 81353 for  
NASPO COMPUTER EQUIPMENT, PERIPHERALS & RELATED SERVICES**

Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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**ATTACHMENT E**

**Participating Entity Product and Service Exclusions and Clarifications**

- 1) Software that can be purchased from another statewide contract should not be purchased on this contract.
- 2) Contractors may offer limited professional services related ONLY to the equipment and configuration of the equipment purchased through the resulting contracts.
- 3) In the event replacement Hardware is needed due to defects in material and/or workmanship, the Contractor shall either replace the non-functional Hardware with new Hardware or refurbished/reconditioned/remanufactured Hardware at the discretion of the State. If the State elects to receive refurbished/reconditioned/remanufactured Hardware, then the Contractor shall credit the invoice for the applicable Order in an amount equal to the difference in cost between the new Hardware and the refurbished/reconditioned/remanufactured Hardware.

**Participating Addendum Number 81353 for  
NASPO COMPUTER EQUIPMENT, PERIPHERALS & RELATED SERVICES**  
Between **STATE OF TENNESSEE** and **Lenovo (United States) Inc.**

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[Reserved]

**ATTACHMENT F**



# OAK RIDGE SCHOOLS

## Technology Department

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



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## MEMORANDUM

**Date:** March 7, 2025

**To:** Kelly Williams

**From:** Doug Cofer 

**Subject:** 5<sup>th</sup>-12<sup>th</sup> Grade Student Laptop Bags

I recommend purchasing approval of 3,500 Bump Armor laptop bags in the amount of \$105,000. Purchase would be dependent on FY26 budget approval. Funds would come from account 141-71100-722-000-000-00000-226.

This purchase is utilizing the Sourcewell contract, which meets bidding requirements.



Thank you for choosing CDW. We have received your quote.

Hardware    Software    Services    IT Solutions    Brands    Research Hub

# QUOTE CONFIRMATION

**SUSAN DUNDORE,**

Thank you for considering CDW•G for your technology needs. The details of your quote are below. **If you are an eProcurement or single sign on customer, please log into your system to access the CDW site.** You can search for your quote to retrieve and transfer back into your system for processing.

For all other customers, click below to convert your quote to an order.

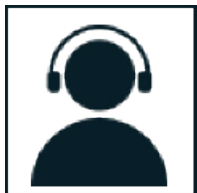
**Convert Quote to Order**

QUOTE #	QUOTE DATE	QUOTE REFERENCE	CUSTOMER #	GRAND TOTAL
PHQJ018	2/20/2025	BUMP ARMOR 13" - SOURCEWELL	0729655	<b>\$105,000.00</b>

QUOTE DETAILS				
ITEM	QTY	CDW#	UNIT PRICE	EXT. PRICE
<a href="#">Bump Armor Stay-In Case CL100 - notebook carrying case</a> Mfg. Part#: CL-13BK Contract: Sourcewell 121923-CDWG Tech Catalog (121923)	3500	4669606	\$30.00	\$105,000.00

<b>SUBTOTAL</b>	\$105,000.00
<b>SHIPPING</b>	\$0.00
<b>SALES TAX</b>	\$0.00
<b>GRAND TOTAL</b>	<b>\$105,000.00</b>

PURCHASER BILLING INFO	DELIVER TO
<b>Billing Address:</b> OAK RIDGE SCHOOLS 304 NEW YORK AVE OAK RIDGE, TN 37830-5217 <b>Phone:</b> (865) 425-9004 <b>Payment Terms:</b> NET 30 Days-Govt/Ed	<b>Shipping Address:</b> OAK RIDGE SCHOOLS 127 PROVIDENCE RD SUITE 100 OAK RIDGE, TN 37830 <b>Shipping Method:</b> DROP SHIP-GROUND
	<b>Please remit payments to:</b> CDW Government 75 Remittance Drive Suite 1515 Chicago, IL 60675-1515



### Sales Contact Info

**Rebekah Marco** | (866) 301-5740 | [rebmarc@cdwg.com](mailto:rebmarc@cdwg.com)

**Solicitation Number: RFP #121923****CONTRACT**

This Contract is between Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and CDW Government LLC, 230 N. Milwaukee Avenue, Vernon Hills, IL 60061 (Supplier).

Sourcewell is a State of Minnesota local government unit and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) that offers cooperative procurement solutions to government entities. Participation is open to eligible federal, state/province, and municipal governmental entities, higher education, K-12 education, nonprofit, tribal government, and other public entities located in the United States and Canada. Sourcewell issued a public solicitation for Technology Products and Services with Related Solutions from which Supplier was awarded a contract in Category 1.

Supplier desires to contract with Sourcewell to provide equipment, products, or services to Sourcewell and the entities that access Sourcewell's cooperative purchasing contracts (Participating Entities).

**1. TERM OF CONTRACT**

A. **EFFECTIVE DATE.** This Contract is effective upon the date of the final signature below.

**EXPIRATION DATE AND EXTENSION.** This Contract expires February 27, 2028, unless it is cancelled sooner pursuant to Article 22. This Contract allows up to three additional one-year extensions upon the request of Sourcewell and written agreement by Supplier. Sourcewell retains the right to consider additional extensions beyond seven years as required under exceptional circumstances.

B. **SURVIVAL OF TERMS.** Notwithstanding any expiration or termination of this Contract, all payment obligations incurred prior to expiration or termination will survive, as will the following: Articles 11 through 14 survive the expiration or cancellation of this Contract. All other rights will cease upon expiration or termination of this Contract.

## 2. EQUIPMENT, PRODUCTS, OR SERVICES

A. EQUIPMENT, PRODUCTS, OR SERVICES. Supplier will provide the Equipment, Products, or Services as stated in its Proposal submitted under the Solicitation Number listed above. Supplier's Equipment, Products, or Services Proposal (Proposal) is attached and incorporated into this Contract.

All Equipment and Products provided under this Contract must be new and the current model. Supplier may offer close-out or refurbished Equipment or Products if they are clearly indicated in Supplier's product and pricing list. Unless agreed to by the Participating Entities in advance, Equipment or Products must be delivered as operational to the Participating Entity's site.

This Contract offers an indefinite quantity of sales, and while substantial volume is anticipated, sales and sales volume are not guaranteed.

### B. WARRANTY.

1. *Product Warranty.* Supplier is not the manufacturer of the Products purchased by Participating Entities hereunder and the only warranties offered are those of the manufacturer, not Supplier or its Affiliates. In purchasing the Products, the Participating Entity relies on the manufacturer's specifications only and not on any statements or images that may be provided by Supplier or its Affiliates. SUPPLIER HEREBY EXPRESSLY DISCLAIMS ALL WARRANTIES EITHER EXPRESS OR IMPLIED RELATED TO PRODUCTS, INCLUDING BUT NOT LIMITED TO ANY WARRANTY OF TITLE ACCURACY, MERCHANTABILITY, OR FITNESS FOR A PARTICULAR PURPOSE, WARRANTY OF NONINFRINGEMENT, OR ANY WARRANTY RELATING TO THIRD PARTY SERVICES. THE DISCLAIMER CONTAINED IN THIS PARAGRAPH DOES NOT AFFECT THE TERMS OF ANY MANUFACTURER'S WARRANTY. Supplier, and its dealers and distributors must agree to assist the Participating Entity in reaching a resolution in any dispute over warranty terms with the manufacturer.

2. *Services Warranty.* Supplier warrants that the Services will be performed in a good and workmanlike manner. Participating Entity's sole and exclusive remedy with respect to this warranty will be at the sole option of Supplier to either (a) use its reasonable commercial efforts to reperform any Services not in substantial compliance with this warranty or (b) refund amounts paid by the Participating Entity related to the portion of the Services not in substantial compliance; provided in each case Participating Entity notifies Supplier in writing within thirty (30) business days after performance of the applicable Services. This warranty is voided if the Services are altered by anyone other than Supplier or any of its affiliates or its or their personnel. Participating Entity shall be solely responsible for reconstructing data (including but not limited to data located on disk files and memories) and software that may be lost or damaged or corrupted during the performance of Services.

3. *Third-Party Services.* Certain services, such as extended warranty service by manufacturers, are sold by Supplier as a distributor or sales agent ("Third Party Services"). In the case of Third-Party Services, the third party will be the party responsible for providing the services to the Participating Entity and the Participating Entity will look solely to the third party for any loss,

claims or damages arising from or related to the provision of such Third-Party Services. Any amounts, including, but not limited to, taxes, associated with Third-Party Services which may be collected by Supplier will be collected solely in the capacity as an independent sales agent.

4. *Cloud Services*. It is acknowledged that Participating Entities are receiving the Cloud Services directly from the Cloud Service Provider pursuant to the Cloud Service Provider's standard terms and conditions, or such other terms as agreed upon by Participating Entities and the Cloud Service Provider ("Cloud Services Terms and Conditions"). Accordingly, it shall consider the Cloud Service Provider to be the contracting party and the Cloud Service Provider shall be the party responsible for providing the Cloud Services to Participating Entities and shall look solely to the Cloud Service Provider for any loss, claims, or damages arising from or related to the provision of such Cloud Services.

C. DEALERS, AND DISTRIBUTORS. Upon Contract execution and throughout the Contract term, Supplier must provide to Sourcewell a current means to validate or authenticate Supplier's authorized dealers, or distributors relative to the Equipment, Products, and Services offered under this Contract, which will be incorporated into this Contract by reference. It is the Supplier's responsibility to ensure Sourcewell receives the most current information.

### 3. PRICING

All Equipment, Products, or Services under this Contract will be priced at or below the price stated in Supplier's Proposal.

When providing pricing quotes to Participating Entities, all pricing quoted must reflect a Participating Entity's total cost of acquisition. This means that the quoted cost is for delivered Equipment, Products, and Services that are operational for their intended purpose, and includes all costs to the Participating Entity's requested delivery location.

Regardless of the payment method chosen by the Participating Entity, the total cost associated with any purchase option of the Equipment, Products, or Services must always be disclosed in the pricing quote to the applicable Participating Entity at the time of purchase.

A. SHIPPING AND SHIPPING COSTS. All delivered Equipment and Products must be properly packaged. Damaged Equipment and Products may be rejected. If the damage is not readily apparent at the time of delivery, Supplier must permit the Equipment and Products to be returned within a reasonable time at no cost to Sourcewell or its Participating Entities in accordance with Supplier's Return Policy, which is available at: <https://webobjects2.cdw.com/is/content/CDW/cdw/on-domain-ca/help-centre/cdw-global-returns-policy.pdf>. Participating Entities reserve the right to inspect the Equipment and Products at a reasonable time after delivery where circumstances or conditions prevent effective inspection of the Equipment and Products at the time of delivery. In the event of the delivery of nonconforming Equipment and Products, the Participating Entity will notify the Supplier as soon as possible and the Supplier will replace nonconforming Equipment and

Products with conforming Equipment and Products that are acceptable to the Participating Entity.

Supplier must arrange for and pay for the return shipment on Equipment and Products that arrive in a defective or inoperable condition.

Sourcwell may declare the Supplier in breach of this Contract if the Supplier intentionally delivers substandard or inferior Equipment or Products.

B. SALES TAX. Each Participating Entity is responsible for supplying the Supplier with valid tax-exemption certification(s). When ordering, a Participating Entity must indicate if it is a tax-exempt entity.

C. HOT LIST PRICING. At any time during this Contract, Supplier may offer a specific selection of Equipment, Products, or Services at discounts greater than those listed in the Contract. When Supplier determines it will offer Hot List Pricing, it must be submitted electronically to Sourcwell in a line-item format. Equipment, Products, or Services may be added or removed from the Hot List at any time through a Sourcwell Price and Product Change Form as defined in Article 4 below.

Hot List program and pricing may also be used to discount and liquidate close-out and discontinued Equipment and Products as long as those close-out and discontinued items are clearly identified as such. Current ordering process and administrative fees apply. Hot List Pricing must be published and made available to all Participating Entities.

#### **4. PRODUCT AND PRICING CHANGE REQUESTS**

Supplier may request Equipment, Product, or Service changes, additions, or deletions at any time. All requests must be made in writing by submitting a signed Sourcwell Price and Product Change Request Form to the assigned Sourcwell Supplier Development Administrator. This approved form is available from the assigned Sourcwell Supplier Development Administrator. At a minimum, the request must:

- Identify the applicable Sourcwell contract number;
- Clearly specify the requested change;
- Provide sufficient detail to justify the requested change;
- Individually list all Equipment, Products, or Services affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
- Include a complete restatement of pricing documentation in Microsoft Excel with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Equipment, Products, and Services offered, even for those items where pricing remains unchanged.

A fully executed Sourcewell Price and Product Change Request Form will become an amendment to this Contract and will be incorporated by reference.

## **5. PARTICIPATION, CONTRACT ACCESS, AND PARTICIPATING ENTITY REQUIREMENTS**

A. PARTICIPATION. Sourcewell's cooperative contracts are available and open to public and nonprofit entities across the United States and Canada; such as federal, state/province, municipal, K-12 and higher education, tribal government, and other public entities.

The benefits of this Contract should be available to all Participating Entities that can legally access the Equipment, Products, or Services under this Contract. A Participating Entity's authority to access this Contract is determined through its cooperative purchasing, interlocal, or joint powers laws. Any entity accessing benefits of this Contract will be considered a Service Member of Sourcewell during such time of access. Supplier understands that a Participating Entity's use of this Contract is at the Participating Entity's sole convenience and Participating Entities reserve the right to obtain like Equipment, Products, or Services from any other source.

Supplier is responsible for familiarizing its sales and service forces with Sourcewell contract use eligibility requirements and documentation and will encourage potential participating entities to join Sourcewell. Sourcewell reserves the right to add and remove Participating Entities to its roster during the term of this Contract.

B. PUBLIC FACILITIES. Supplier's employees may be required to perform work at government-owned facilities, including schools. Supplier's employees and agents must conduct themselves in a professional manner while on the premises, and in accordance with Participating Entity policies and procedures, and all applicable laws.

## **6. PARTICIPATING ENTITY USE AND PURCHASING**

A. ORDERS AND PAYMENT. To access the contracted Equipment, Products, or Services under this Contract, a Participating Entity must clearly indicate to Supplier that it intends to access this Contract; however, order flow and procedure will be developed jointly between Sourcewell and Supplier. Typically, a Participating Entity will issue an order directly to Supplier or its authorized subsidiary, distributor, dealer, or reseller. If a Participating Entity issues a purchase order, it may use its own forms, but the purchase order should clearly note the applicable Sourcewell contract number. All Participating Entity orders under this Contract must be issued prior to expiration or cancellation of this Contract; however, Supplier performance, Participating Entity payment obligations, and any applicable warranty periods or other Supplier or Participating Entity obligations may extend beyond the term of this Contract.

Supplier's acceptable forms of payment are included in its attached Proposal. Participating Entities will be solely responsible for payment and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.

B. **ADDITIONAL TERMS AND CONDITIONS/PARTICIPATING ADDENDUM.** Additional terms and conditions to a purchase order, or other required transaction documentation, may be negotiated between a Participating Entity and Supplier, such as job or industry-specific requirements, legal requirements (e.g., affirmative action or immigration status requirements), or specific local policy requirements. Some Participating Entities may require the use of a Participating Addendum, the terms of which will be negotiated directly between the Participating Entity and the Supplier or its authorized dealers, distributors, or resellers, as applicable. Any negotiated additional commercial terms and conditions must never be less favorable to the Participating Entity than what is contained in this Contract.

C. **SPECIALIZED SERVICE REQUIREMENTS.** In the event that the Participating Entity requires service or specialized performance requirements not addressed in this Contract (such as e-commerce specifications, specialized delivery requirements, or other specifications and requirements), the Participating Entity and the Supplier may enter into a separate, standalone agreement, apart from this Contract. Sourcewell, including its agents and employees, will not be made a party to a claim for breach of such agreement.

D. **TERMINATION OF ORDERS.** Participating Entities may terminate an order, in whole or in part, immediately upon notice to Supplier in the event of any of the following events:

1. The Participating Entity fails to receive funding or appropriation from its governing body at levels sufficient to pay for the equipment, products, or services to be purchased; or
2. Federal, state, or provincial laws or regulations prohibit the purchase or change the Participating Entity's requirements.

E. **GOVERNING LAW AND VENUE.** The governing law and venue for any action related to a Participating Entity's order will be determined by the Participating Entity making the purchase.

## **7. CUSTOMER SERVICE**

A. **PRIMARY ACCOUNT REPRESENTATIVE.** Supplier will assign an Account Representative to Sourcewell for this Contract and must provide prompt notice to Sourcewell if that person is changed. The Account Representative will be responsible for:

- Maintenance and management of this Contract;

- Timely response to all Sourcwell and Participating Entity inquiries; and
- Business reviews to Sourcwell and Participating Entities, if applicable.

B. BUSINESS REVIEWS. Supplier must perform a minimum of one business review with Sourcwell per contract year. The business review will cover sales to Participating Entities, pricing and contract terms, administrative fees, sales data reports, performance issues, supply issues, customer issues, and any other necessary information.

## **8. REPORT ON CONTRACT SALES ACTIVITY AND ADMINISTRATIVE FEE PAYMENT**

A. CONTRACT SALES ACTIVITY REPORT. Each calendar quarter, Supplier must provide a contract sales activity report (Report) to the Sourcwell Supplier Development Administrator assigned to this Contract. Reports are due no later than 45 days after the end of each calendar quarter. A Report must be provided regardless of the number or amount of sales during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made).

The Report must contain the following fields:

- Participating Entity Name (e.g., City of Staples Highway Department);
- Participating Entity Physical Street Address;
- Participating Entity City;
- Participating Entity State/Province;
- Participating Entity Zip/Postal Code;
- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;
- Sourcwell Assigned Entity/Participating Entity Number;
- Item Purchased Description;
- Item Purchased Price;
- Sourcwell Administrative Fee Applied; and
- Date Purchase was invoiced/sale was recognized as revenue by Supplier.

B. ADMINISTRATIVE FEE. In consideration for the support and services provided by Sourcwell, the Supplier will pay an administrative fee to Sourcwell on all Equipment, Products, and Services provided to Participating Entities as indicated in Question #70 of its Proposal. The Administrative Fee must be included in, and not added to, the pricing. Supplier may not charge Participating Entities more than the contracted price to offset the Administrative Fee.

The Supplier will submit payment to Sourcwell for the percentage of administrative fee stated in Question #70 of the Proposal multiplied by the total sales of all Equipment, Products, and Services purchased by Participating Entities under this Contract during each calendar quarter.

Payments should note the Supplier's name and Sourcewell-assigned contract number in the memo; and must be mailed to the address above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions. Payments must be received no later than 45 calendar days after the end of each calendar quarter.

Supplier agrees to cooperate with Sourcewell in auditing transactions under this Contract to ensure that the administrative fee is paid on all items purchased under this Contract.

In the event the Supplier is delinquent in any undisputed administrative fees, Sourcewell reserves the right to cancel this Contract and reject any proposal submitted by the Supplier in any subsequent solicitation. In the event this Contract is cancelled by either party prior to the Contract's expiration date, the administrative fee payment will be due no more than 30 days from the cancellation date.

## **9. AUTHORIZED REPRESENTATIVE**

Sourcewell's Authorized Representative is its Chief Procurement Officer.

Supplier's Authorized Representative is the person named in the Supplier's Proposal. If Supplier's Authorized Representative changes at any time during this Contract, Supplier must promptly notify Sourcewell in writing.

## **10. AUDIT, ASSIGNMENT, AMENDMENTS, WAIVER, AND CONTRACT COMPLETE**

A. **AUDIT.** Pursuant to Minnesota Statutes Section 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Contract are subject to examination by Sourcewell or the Minnesota State Auditor for a minimum of six years from the end of this Contract. Sourcewell may not conduct such an audit more than one time per twelve month period during the term, and will provide thirty day advance written notice of the audit to Supplier. This clause extends to Participating Entities as it relates to business conducted by that Participating Entity under this Contract.

B. **ASSIGNMENT.** Neither party may assign or otherwise transfer its rights or obligations under this Contract without the prior written consent of the other party and a fully executed assignment agreement. Such consent will not be unreasonably withheld. Any prohibited assignment will be invalid.

C. **AMENDMENTS.** Any amendment to this Contract must be in writing and will not be effective until it has been duly executed by the parties.

D. **WAIVER.** Failure by either party to take action or assert any right under this Contract will not be deemed a waiver of such right in the event of the continuation or repetition of the

circumstances giving rise to such right. Any such waiver must be in writing and signed by the parties.

E. **CONTRACT COMPLETE.** This Contract represents the complete agreement between the parties. No other understanding regarding this Contract, whether written or oral, may be used to bind either party. For any conflict between the attached Proposal and the terms set out in Articles 1-22 of this Contract, the terms of Articles 1-22 will govern.

F. **RELATIONSHIP OF THE PARTIES.** The relationship of the parties is one of independent contractors, each free to exercise judgment and discretion with regard to the conduct of their respective businesses. This Contract does not create a partnership, joint venture, or any other relationship such as master-servant, or principal-agent.

### **11. INDEMNITY AND HOLD HARMLESS; LIMITATION OF LIABILITY**

Supplier must indemnify, defend, save, and hold Sourcewell and its Participating Entities, including their agents and employees, harmless from any third-party claims or causes of action, including attorneys' fees incurred by Sourcewell or its Participating Entities, arising out of any act or omission in the performance of this Contract by the Supplier or its agents or employees which results in (i) injury or death to person(s) or tangible personal property alleged to have been caused by some defect in the Equipment, Products, or Services under this Contract to the extent the Service has been used according to its specifications. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.

Supplier shall pass through to the Participating Entity all end user indemnity protections provided by the Equipment and/or Product manufacturer.

EXCEPT FOR INSTANCES OF GROSS NEGLIGENCE OR WILLFUL MISCONDUCT, UNDER NO CIRCUMSTANCES, AND NOTWITHSTANDING THE FAILURE OF ESSENTIAL PURPOSE OF ANY REMEDY SET FORTH HEREIN, WILL SUPPLIER, ITS AFFILIATES OR ITS SUPPLIERS, SUBCONTRACTORS OR AGENDT BE LIABLE FOR ANY INCIDENTAL, INDIRECT, SPECIAL, OR CONSEQUENTIAL DAMAGES, INCLUDING BUT NOT LIMITED TO LOSS OF PROFITS, BUSINESS REVENUES OR SAVINGS AND LOSS, DAMAGE OR CORRUPTION OF DATA OR SOFTWARE, EVEN IF SUCH PARTY HAS BEEN ADVISED OF THE POSSIBILITIES OF SUCH DAMAGES OR IF SUCH DAMAGES ARE OTHERWISE FORESEEABLE. EXCEPT IN THE EVENT OF GROSS NEGLIGENCE OR WILLFUL MISCONDUCT, SUPPLIER'S AGGREGATE LIALITY HEREUNDER WILL NOT EXCEED THE TOTAL DOLLAR AMOUNT PAID BY SUPPLIER TO SOURCEWELL IN ADMINISTRATIVE FEES UNDER THIS CONTRACT DURING THE PRECEDING TWENTY-FOUR (24) MONTH PERIOD.

## 12. GOVERNMENT DATA PRACTICES

Supplier and Sourcewell must comply with the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13, as it applies to all data provided by or provided to Sourcewell under this Contract and as it applies to all data created, collected, received, maintained, or disseminated by the Supplier under this Contract.

## 13. INTELLECTUAL PROPERTY, PUBLICITY, MARKETING, AND ENDORSEMENT

### A. INTELLECTUAL PROPERTY

1. *Grant of License.* During the term of this Contract:
  - a. Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising and promotional materials for the purpose of marketing Sourcewell's relationship with Supplier.
  - b. Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising and promotional materials for the purpose of marketing Supplier's relationship with Sourcewell.
2. *Limited Right of Sublicense.* The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, and agents (collectively "Permitted Sublicensees") in advertising and promotional materials for the purpose of marketing the Parties' relationship to Participating Entities. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this Article by any of their respective sublicensees.
3. *Use; Quality Control.*
  - a. Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.
  - b. Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Upon written notice to the breaching party, the breaching party has 30 days of the date of the written notice to cure the breach or the license will be terminated.
4. *Termination.* Upon the termination of this Contract for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party's name or logo (excepting Sourcewell's pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell's written directions.
5. *License to Software.* All rights in software resold pursuant to this Contract will remain with the applicable licensor. Participating Entity's rights to use such

software are contained in the applicable license agreement between the Participating Entity and the licensor.

6. *License to Work Product.* Participating Entity's rights to Work Product (meaning materials and other deliverables to be provided or created individually or jointly in connection with the Services, including but not limited to all inventions, discoveries, methods, processes, formulae, ideas, concepts, techniques, know-how, data, designs, models, prototypes, works of authorship, computer programs, proprietary tools, methods of analysis, and other information whether or not capable of protection by patent, copyright, trade secret, confidentiality, or other proprietary rights, or discovered in the course of performance of this Contract, that are embodied in such work or materials) will be upon payment in full a non-transferable, non-exclusive, royalty-free license to use such Work Product solely for Participating Entity's internal use. Participating Entity obtains no ownership or other property rights thereto. Participating Entity agrees that Supplier may incorporate intellectual property created by third parties into the Work Product and that Participating Entity's right to use such Work Product may be subject to the rights of and limited by agreements with such third parties.

B. **PUBLICITY.** Any publicity regarding the subject matter of this Contract must not be released without prior written approval from the Authorized Representatives. Publicity includes notices, informational pamphlets, press releases, research, reports, signs, and similar public notices prepared by or for the Supplier individually or jointly with others, or any subcontractors, with respect to the program, publications, or services provided resulting from this Contract.

C. **MARKETING.** Any direct advertising, marketing, or offers with Participating Entities must be approved by Sourcewell. Send all approval requests to the Sourcewell Supplier Development Administrator assigned to this Contract.

D. **ENDORSEMENT.** The Supplier must not claim that Sourcewell endorses its Equipment, Products, or Services.

#### **14. GOVERNING LAW, JURISDICTION, AND VENUE**

The substantive and procedural laws of the State of Minnesota will govern this Contract. Venue for all legal proceedings arising out of this Contract, or its breach, must be in the appropriate state court in Todd County, Minnesota or federal court in Fergus Falls, Minnesota.

#### **15. FORCE MAJEURE**

Neither party to this Contract will be held responsible for delay or default caused by acts of God or other conditions that are beyond that party's reasonable control. A party defaulting under this provision must provide the other party prompt written notice of the default.

## 16. SEVERABILITY

If any provision of this Contract is found by a court of competent jurisdiction to be illegal, unenforceable, or void then both parties will be relieved from all obligations arising from that provision. If the remainder of this Contract is capable of being performed, it will not be affected by such determination or finding and must be fully performed.

## 17. PERFORMANCE, DEFAULT, AND REMEDIES

A. **PERFORMANCE.** During the term of this Contract, the parties will monitor performance and address unresolved contract issues as follows:

1. *Notification.* The parties must promptly notify each other of any known dispute and work in good faith to resolve such dispute within a reasonable period of time. If necessary, Sourcewell and the Supplier will jointly develop a short briefing document that describes the issue(s), relevant impact, and positions of both parties.
2. *Escalation.* If parties are unable to resolve the issue in a timely manner, as specified above, either Sourcewell or Supplier may escalate the resolution of the issue to a higher level of management. The Supplier will have 30 calendar days to cure an outstanding issue.
3. *Performance while Dispute is Pending.* Notwithstanding the existence of a dispute, the Supplier must continue without delay to carry out all of its responsibilities under the Contract that are not affected by the dispute. If the Supplier fails to continue without delay to perform its responsibilities under the Contract, in the accomplishment of all undisputed work, the Supplier will bear any additional costs incurred by Sourcewell and/or its Participating Entities as a result of such failure to proceed.

B. **DEFAULT AND REMEDIES.** Either of the following constitutes cause to declare this Contract, or any Participating Entity order under this Contract, in default:

1. Nonperformance of contractual requirements, or
2. A material breach of any term or condition of this Contract.

The party claiming default must provide written notice of the default, with 30 calendar days to cure the default. Time allowed for cure will not diminish or eliminate any liability for liquidated or other damages. If the default remains after the opportunity for cure, the non-defaulting party may:

- Exercise any remedy provided by law or equity, or
- Terminate the Contract or any portion thereof, including any orders issued against the Contract.

## 18. INSURANCE

A. REQUIREMENTS. At its own expense, Supplier must maintain insurance policy(ies) in effect at all times during the performance of this Contract with insurance company(ies) licensed or authorized to do business in the State of Minnesota having an "AM BEST" rating of A- or better, with coverage and limits of insurance not less than the following:

1. *Workers' Compensation and Employer's Liability.*

Workers' Compensation: As required by any applicable law or regulation.

Employer's Liability Insurance: must be provided in amounts not less than listed below:

Minimum limits:

\$500,000 each accident for bodily injury by accident

\$500,000 policy limit for bodily injury by disease

\$500,000 each employee for bodily injury by disease

2. *Commercial General Liability Insurance.* Supplier will maintain insurance covering its operations, with coverage on an occurrence basis, and must be subject to terms no less broad than the Insurance Services Office ("ISO") Commercial General Liability Form CG0001 (2001 or newer edition), or equivalent. At a minimum, coverage must include liability arising from premises, operations, bodily injury and property damage, independent contractors, products-completed operations including construction defect, contractual liability, blanket contractual liability, and personal injury and advertising injury. All required limits, terms and conditions of coverage must be maintained during the term of this Contract.

Minimum Limits:

\$1,000,000 each occurrence Bodily Injury and Property Damage

\$1,000,000 Personal and Advertising Injury

\$2,000,000 aggregate for products liability-completed operations

\$2,000,000 general aggregate

3. *Commercial Automobile Liability Insurance.* During the term of this Contract, Supplier will maintain insurance covering all owned, hired, and non-owned automobiles in limits of liability not less than indicated below. The coverage must be subject to terms no less broad than ISO Business Auto Coverage Form CA 0001 (2010 edition or newer), or equivalent.

Minimum Limits:

\$1,000,000 each accident, combined single limit

4. *Umbrella Insurance.* During the term of this Contract, Supplier will maintain umbrella coverage over Employer's Liability, Commercial General Liability, and Commercial Automobile.

Minimum Limits:

\$2,000,000

5. *Professional/Technical, Errors and Omissions, and/or Miscellaneous Professional Liability.* During the term of this Contract, Supplier will maintain coverage for all claims the Supplier may become legally obligated to pay resulting from any actual or alleged negligent act, error, or omission related to Supplier's professional services required under this Contract.

Minimum Limits:

\$2,000,000 per claim or event

\$2,000,000 – annual aggregate

6. *Network Security and Privacy Liability Insurance.* During the term of this Contract, Supplier will maintain coverage for network security and privacy liability. The coverage may be endorsed on, or included in, another form of liability coverage or written on a standalone policy. The insurance must cover claims which may arise from failure of Supplier's security resulting in, but not limited to, computer attacks, unauthorized access, disclosure of not public data – including but not limited to, confidential or private information, transmission of a computer virus, or denial of service.

Minimum limits:

\$2,000,000 per occurrence

\$2,000,000 annual aggregate

Failure of Supplier to maintain the required insurance will constitute a material breach entitling Sourcewell to immediately terminate this Contract for default.

B. CERTIFICATES OF INSURANCE. Prior to commencing under this Contract, Supplier must furnish to Sourcewell a certificate of insurance, as evidence of the insurance required under this Contract. Prior to expiration of the policy(ies), renewal certificates must be mailed to Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or sent to the Sourcewell Supplier Development Administrator assigned to this Contract. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf.

Failure to request certificates of insurance by Sourcewell, or failure of Supplier to provide certificates of insurance, in no way limits or relieves Supplier of its duties and responsibilities in this Contract.

C. ADDITIONAL INSURED ENDORSEMENT AND PRIMARY AND NON-CONTRIBUTORY INSURANCE CLAUSE. Supplier agrees to include Sourcewell and its Participating Entities, including their officers, agents, and employees, as an additional insured under the Supplier's commercial general liability insurance policy with respect to liability arising out of activities, "operations," or "work" performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.

D. **WAIVER OF SUBROGATION.** Supplier waives and must require (by endorsement or otherwise) all its insurers to waive subrogation rights against Sourcewell and other additional insureds for losses paid under the insurance policies required by this Contract or other insurance applicable to the Supplier or its subcontractors. The waiver must apply to all deductibles and/or self-insured retentions applicable to the required or any other insurance maintained by the Supplier or its subcontractors. Where permitted by law, Supplier must require similar written express waivers of subrogation and insurance clauses from each of its subcontractors.

E. **UMBRELLA/EXCESS LIABILITY/SELF-INSURED RETENTION.** The limits required by this Contract can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.

## **19. COMPLIANCE**

A. **LAWS AND REGULATIONS.** All Equipment, Products, or Services provided under this Contract must comply fully with applicable federal laws and regulations, and with the laws in the states and provinces in which the Equipment, Products, or Services are sold.

B. **LICENSES.** Supplier must maintain a valid and current status on all required federal, state/provincial, and local licenses, bonds, and permits required for the operation of the business that the Supplier conducts with Sourcewell and Participating Entities.

## **20. BANKRUPTCY, DEBARMENT, OR SUSPENSION CERTIFICATION**

Supplier certifies and warrants that it is not in bankruptcy or that it has previously disclosed in writing certain information to Sourcewell related to bankruptcy actions. If at any time during this Contract Supplier declares bankruptcy, Supplier must immediately notify Sourcewell in writing.

Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government or the Canadian government, as applicable; or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Contract. Supplier further warrants that it will provide immediate written notice to Sourcewell if this certification changes at any time.

## **21. PROVISIONS FOR NON-UNITED STATES FEDERAL ENTITY PROCUREMENTS UNDER UNITED STATES FEDERAL AWARDS OR OTHER AWARDS**

Participating Entities that use United States federal grant or FEMA funds to purchase goods or services from this Contract may be subject to additional requirements including the

procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Article, all references to “federal” should be interpreted to mean the United States federal government. The following list only applies when a Participating Entity accesses Supplier’s Equipment, Products, or Services with United States federal funds.

A. **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all contracts that meet the definition of “federally assisted construction contract” in 41 C.F.R. § 60-1.3 must include the equal opportunity clause provided under 41 C.F.R. §60-1.4(b), in accordance with Executive Order 11246, “Equal Employment Opportunity” (30 FR 12319, 12935, 3 C.F.R. §, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, “Amending Executive Order 11246 Relating to Equal Employment Opportunity,” and implementing regulations at 41 C.F.R. § 60, “Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor.” The equal opportunity clause is incorporated herein by reference.

B. **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** When required by federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. § 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 C.F.R. § 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-federal entity must report all suspected or reported violations to the federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. § 3145), as supplemented by Department of Labor regulations (29 C.F.R. § 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-federal entity must report all suspected or reported violations to the federal awarding agency. Supplier must be in compliance with all applicable Davis-Bacon Act provisions.

C. **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. § 3701-3708).** Where applicable, all contracts awarded by the non-federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. §§ 3702 and 3704, as supplemented by Department of Labor regulations (29 C.F.R. § 5).

Under 40 U.S.C. § 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. § 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies or materials or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence. This provision is hereby incorporated by reference into this Contract. Supplier certifies that during the term of an award for all contracts by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

D. RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT. If the federal award meets the definition of “funding agreement” under 37 C.F.R. § 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 C.F.R. § 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency. Supplier certifies that during the term of an award for all contracts by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

E. CLEAN AIR ACT (42 U.S.C. § 7401-7671Q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. § 1251-1387). Contracts and subgrants of amounts in excess of \$150,000 require the non-federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. § 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. § 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). Supplier certifies that during the term of this Contract will comply with applicable requirements as referenced above.

F. DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689). A contract award (see 2 C.F.R. § 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. §180 that implement Executive Orders 12549 (3 C.F.R. § 1986 Comp., p. 189) and 12689 (3 C.F.R. § 1989 Comp., p. 235), “Debarment and Suspension.” SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

G. BYRD ANTI-LOBBYING AMENDMENT, AS AMENDED (31 U.S.C. § 1352). Suppliers must file any required certifications. Suppliers must not have used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Suppliers must disclose any lobbying with non-federal funds that takes place in connection with obtaining any federal award. Such disclosures are forwarded from tier to tier up to the non-federal award. Suppliers must file all certifications and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).

H. RECORD RETENTION REQUIREMENTS. To the extent applicable, Supplier must comply with the record retention requirements detailed in 2 C.F.R. § 200.333. The Supplier further certifies that it will retain all records as required by 2 C.F.R. § 200.333 for a period of 3 years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

I. ENERGY POLICY AND CONSERVATION ACT COMPLIANCE. To the extent applicable, Supplier must comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.

J. BUY AMERICAN PROVISIONS COMPLIANCE. To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.

K. ACCESS TO RECORDS (2 C.F.R. § 200.336). Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Contract for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.

L. PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322). A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring

solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

M. FEDERAL SEAL(S), LOGOS, AND FLAGS. The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.

N. NO OBLIGATION BY FEDERAL GOVERNMENT. The U.S. federal government is not a party to this Contract or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Contract or any purchase by an authorized user.

O. PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS. The Contractor acknowledges that 31 U.S.C. 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Contract or any purchase by a Participating Entity.

P. FEDERAL DEBT. The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.

Q. CONFLICTS OF INTEREST. The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this Contract or any aspect related to the anticipated work under this Contract raises an actual or potential conflict of interest (as described in 2 C.F.R. Part 200). The Supplier must explain the actual or potential conflict in writing in sufficient detail so that the U.S. Office of General Services, Sourcewell, and Participating Entity are able to assess the actual or potential conflict; and provide any additional information as necessary or requested.

R. U.S. EXECUTIVE ORDER 13224. The Supplier, and its subcontractors, must comply with U.S. Executive Order 13224 and U.S. Laws that prohibit transactions with and provision of resources and support to individuals and organizations associated with terrorism.

S. PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT. To the extent applicable, Supplier certifies that during the term of this Contract it will comply with applicable requirements of 2 C.F.R. § 200.216.

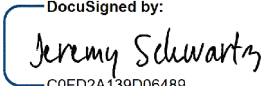
T. DOMESTIC PREFERENCES FOR PROCUREMENTS. To the extent applicable, Supplier certifies that during the term of this Contract will comply with applicable requirements of 2 C.F.R. § 200.322.

## 22. CANCELLATION

Sourcewell or Supplier may cancel this Contract at any time, with or without cause, upon 60 days' written notice to the other party. However, Sourcewell may cancel this Contract immediately upon discovery of a material defect in any certification made in Supplier's Proposal. Cancellation of this Contract does not relieve either party of financial, product, or service obligations incurred or accrued prior to cancellation.

Sourcewell

CDW Government LLC

DocuSigned by:  
  
C0FD2A139D06489...  
By: \_\_\_\_\_  
Jeremy Schwartz  
Title: Chief Procurement Officer  
Date: 3/13/2024 | 9:46 PM CDT

DocuSigned by:  
  
7E5503A3787848D...  
By: \_\_\_\_\_  
Dario Bertocchi  
Title: Vice President Contract Operations  
Date: 3/13/2024 | 2:12 PM PDT



## Proposal Opening Record

Date of opening: December 19, 2023

Sourcewell posted Request for Proposal #121923, for the procurement of Technology Products and Services with Related Solutions, on the Sourcewell Procurement Portal [[portal.sourcewell-mn.gov](http://portal.sourcewell-mn.gov)] on Tuesday, October 31, 2023, and the solicitation remained in an open status within the portal until December 19, 2023, at 4:30 pm CT. The RFP required that all proposals be submitted through the Sourcewell Procurement Portal no later than 4:30 pm CT on December 19, 2023, the date and time specified in the Solicitation Schedule.

The undersigned certify that all responses received on Request for Proposal #121923 were submitted through the Sourcewell Procurement Portal, and that each Proposer's response material was digitally sealed upon submission and remained inaccessible until the due date and time specified in the Solicitation Schedule.

Responses were received from the following:

22nd Century Technologies, Inc. - Submitted Tue Dec 19, 2023 12:03:21 PM  
A3 Communications, Inc. - Submitted Tue Dec 19, 2023 3:14:34 PM  
Access 2 Networks, Inc. - Submitted Tue Dec 19, 2023 6:28:16 AM  
American Signal Corporation - Submitted Tue Dec 19, 2023 10:57:26 AM  
Apple, Inc. - Submitted Tue Dec 19, 2023 10:35:11 AM  
Axelliant, LLC - Submitted Tue Dec 19, 2023 4:28:53 PM  
ByteSpeed, LLC - Submitted Tue Dec 12, 2023 3:28:49 PM  
Carahsoft Technology Corporation - Submitted Tue Dec 19, 2023 4:21:57 PM  
Castellan Information Security Services, Inc. - Submitted Fri Dec 15, 2023 9:30:51 AM  
CDW Government, LLC - Submitted Mon Dec 18, 2023 12:20:13 PM  
Cetrix Technologies, LLC - Submitted Tue Dec 19, 2023 1:18:20 PM  
Computer Aid, Inc. - Submitted Mon Dec 18, 2023 4:37:34 PM  
Converge Technology Solutions US, LLC - Submitted Tue Dec 19, 2023 4:05:03 PM  
Core BTS, Inc. - Submitted Tue Dec 19, 2023 11:17:34 AM  
Data Center Warehouse, LLC - Submitted Tue Dec 19, 2023 11:11:45 AM  
DataHouse Consulting, Inc. - Submitted Tue Dec 19, 2023 4:27:51 PM  
DGR Systems, LLC - Submitted Tue Dec 19, 2023 1:12:38 PM  
Diverse Tech Services, Inc. - Submitted Mon Dec 18, 2023 2:41:14 PM  
EW Recovery - Submitted Tue Dec 19, 2023 11:14:09 AM  
Extreme Networks, Inc. - Submitted Mon Dec 18, 2023 1:33:05 PM

Fortinet, Inc. - Submitted Tue Dec 19, 2023 8:30:22 AM  
FORVIS, LLP - Submitted Tue Dec 19, 2023 12:23:09 PM  
Genetec, Inc. - Submitted Mon Dec 18, 2023 11:19:34 PM  
GoApron, Inc. - Submitted Sun Dec 17, 2023 9:39:44 PM  
GOMAIN EV, INC. - Submitted Mon Dec 18, 2023 3:00:55 PM  
GovConnection, Inc. dba Connection-Public Sector Solutions - Submitted Mon Dec 18, 2023 3:13:26 PM  
GuideSoft, Inc. dba Knowledge Services - Submitted Fri Dec 15, 2023 4:33:25 PM  
HP, Inc. - Submitted Fri Dec 15, 2023 3:40:05 PM  
iBenzer, Inc. - Submitted Tue Dec 19, 2023 6:25:17 AM  
Ideal System Solutions, Inc. - Submitted Tue Dec 19, 2023 2:39:58 PM  
Imagine IT, Inc. - Submitted Sat Dec 16, 2023 1:34:18 PM  
IT Audit Labs, LLC - Submitted Tue Dec 19, 2023 11:27:39 AM  
iTAD Solutions dba mender - Submitted Tue Dec 19, 2023 10:46:54 AM  
M9 Solutions, LLC - Submitted Tue Dec 19, 2023 10:28:30 AM  
MaiaLearning - Submitted Tue Dec 19, 2023 3:45:35 PM  
Marco Technologies, LLC - Submitted Tue Dec 19, 2023 11:16:33 AM  
New Tech Solutions, Inc. - Submitted Tue Dec 19, 2023 4:08:24 PM  
NUTRI-LINK TECHNOLOGIES.COM - Submitted Wed Dec 13, 2023 11:01:47 AM  
Nuvalence, LLC - Submitted Tue Dec 19, 2023 3:30:20 PM  
OpenGov, Inc. - Submitted Tue Dec 19, 2023 11:01:10 AM  
Premier Wireless Business Technology Solutions - Submitted Tue Dec 19, 2023 4:27:09 PM  
Presidio Networked Solutions, LLC - Submitted Mon Dec 18, 2023 1:05:57 PM  
Quality and Assurance Technology Corporation DBA QnA Tech - Submitted Mon Dec 18, 2023 3:31:57 PM  
Renaissance Learning, Inc. - Submitted Mon Dec 18, 2023 12:51:37 PM  
Sena Technologies, Inc. - Submitted Tue Dec 19, 2023 2:05:23 PM  
SHI International Corp. - Submitted Tue Dec 19, 2023 3:26:51 PM  
Sigma Consultants Group, Inc. - Submitted Tue Dec 19, 2023 2:54:27 PM  
Skyline Technology Solutions, LLC - Submitted Tue Dec 19, 2023 2:47:54 PM  
Software Information Resource Corp. - Submitted Mon Dec 18, 2023 7:29:38 AM  
Spruce Technology, Inc. - Submitted Tue Dec 19, 2023 12:22:25 PM  
Strategic Communications, LLC - Submitted Tue Dec 19, 2023 4:13:49 PM  
TALAS Security, LLC - Submitted Mon Dec 18, 2023 6:11:36 PM  
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The Pearl Dream, Inc. - Submitted Mon Dec 18, 2023 11:31:53 PM  
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True North Consulting Group, LLC - Submitted Mon Dec 18, 2023 3:18:27 PM  
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vCloud Tech, Inc. - Submitted Tue Dec 19, 2023 12:02:30 PM  
Vertosoft, LLC - Submitted Mon Dec 18, 2023 3:55:40 PM  
White Rock Security Group, LLC - Submitted Tue Dec 19, 2023 12:00:47 PM  
World Wide Technology, LLC - Submitted Tue Dec 19, 2023 12:59:10 PM  
Xello, Inc. - Submitted Tue Dec 19, 2023 3:35:41 PM  
xFact, Inc. - Submitted Tue Dec 19, 2023 2:48:18 PM  
XS International, LLC - Submitted Tue Dec 19, 2023 4:13:29 PM

Zones, LLC - Submitted Tue Dec 19, 2023 4:25:35 PM

The Proposals were opened electronically, and a list of all Proposers was made publicly available in the Sourcwell Procurement Portal, on December 19, 2023, at 4:30 pm CT. All responsive proposals were then submitted for review by the Sourcwell Evaluation Committee.

DocuSigned by:  
*Kim Austin*  
6830543C58384D1...

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Kim Austin, MBA, CPPB, NIGP-CPP, Procurement Supervisor

DocuSigned by:  
*Carol Jackson*  
6EE63AEDED5F46E...

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Carol Jackson, Procurement Analyst



# The New York State Contract Reporter

This document printed  
Tuesday, 10/31/2023

*NYS' official source of contracting opportunities  
Bringing business and government together*

## Contracting Opportunity

**Title:** Technology Products and Services with Related Solutions

**Agency:** Sourcewell

**Division:** Procurement Department

**Contract Number:** 121923

**CR Number:** 2103321

**Contract Term:** 4 years

**Date of Issue:** 10/31/2023

**Due Date/Time:** 12/19/2023 4:30 PM  
Central Time

**County(ies):** All NYS counties

**Classification:** Information Technology - *Commodities*

**Opportunity Type:** General

**Entered By:** Tara Wolff

**Description:** Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Technology Products and Services with Related Solutions to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://proportal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than December 19, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

**Service-Disabled Veteran-Owned Set Aside:** No

**Business entities awarded an identical or substantially similar procurement contract within the past five years:**

Konica Minolta Business Solutions

Mitel Business Systems

Newcastle Communications

Insight Public Sector, Inc.

## Contact Information

**Primary contact:** Sourcewell  
Procurement Department  
Tara Wolff  
Procurement Manager  
202 12th Street NE  
P.O. Box 219  
Staples, MN 56479  
United States  
Ph: 218-541-5362  
[rfp@sourcewell-mn.gov](mailto:rfp@sourcewell-mn.gov)

**Submit to contact:** Sourcewell  
Procurement Department  
Tara Wolff  
Procurement Manager  
202 12th Street NE  
P.O. Box 219  
Staples, MN 56479  
United States  
Ph: 218-541-5362  
[rfp@sourcewell-mn.gov](mailto:rfp@sourcewell-mn.gov)

## **Bid Results**

Bid Results have not been entered

## Awards

Awards have not been entered



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## EXHIBIT A

### **SOURCEWELL TECHNOLOGY PRODUCTS AND SERVICES WITH RELATED SOLUTIONS**

**Proposals due 4:30 pm,  
December 19, 2023**

#### **REQUEST FOR PROPOSALS**

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Technology Products and Services with Related Solutions to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://proportal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than December 19, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

Published Nov. 1, 2023. 2553043

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The Oklahoman

PO Box 631643 Cincinnati, OH 45263-1643

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Carol Jackson  
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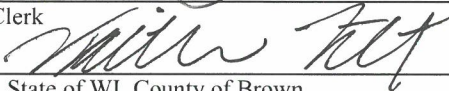
The Oklahoman, a daily newspaper of general circulation in the State of Oklahoma, and which is a daily newspaper published in Oklahoma County and having paid general circulation therein; published and personal knowledge of the facts herein state and that the notice hereto annexed was Published in said newspapers in the issues dated on:

10/31/2023, 11/07/2023

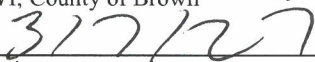
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## Technology Products and Services with Related Solutions

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for **Technology Products and Services with Related Solutions** to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://proportal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than December 19, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

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October 31, November 7  
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 The News Tribune Tacoma  
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 San Luis Obispo Tribune  
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## AFFIDAVIT OF PUBLICATION

Account #	Order Number	Identification	Order PO	Amount	Cols	Depth
34474	483781	Print Legal Ad-IPL01455990 - IPL0145599		\$160.64	1	18 L

Attention: Carol Jackson

SOURCEWELL  
 PO BOX 219  
 STAPLES, MN 56479

carol.jackson@sourcwell-mn.gov

**REQUEST FOR PROPOSALS**

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for **Technology Products and Services with Related Solutions** to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal (<https://portal.sourcewell-mn.gov>). Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than December 19, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.  
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 Oct 31 2023

State of South Carolina

County of Richland

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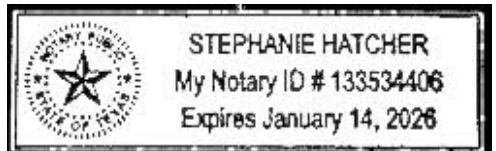
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Sworn to and subscribed before me this 31st day of October in the year of 2023

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## WORLD SERIES

## Unselfish Tommy Pham gives veteran teammate special at-bat



**Bob Nightengale**  
Columnist  
USA TODAY

PHOENIX – Tommy Pham, a 35-year-old journeyman appearing in his first World Series, had the opportunity of a lifetime, a chance to be forever remembered in baseball history.

He was bidding to go where no man has gone for 119 years, becoming the first player to go 5-for-5 in a World Series game.

Pham will instead be remembered for his act of selflessness, sacrificing an opportunity for personal glory, providing his Arizona Diamondbacks teammates, one in particular, a memory they'll never forget.

"That spoke volumes," Diamondbacks manager Torey Lovullo said, "about what that clubhouse feels every single day."

When the Diamondbacks stepped onto the field on Monday night in their first World Series game at Chase Field since 2001, playing Game 3 against the Texas Rangers, it wouldn't have surprised a soul if the sellout crowd brought the house down when Pham was introduced for his gesture heard 'round the baseball world.

The scene was the eighth inning of Game 2 Saturday in the D-backs' 9-1 rout over the Rangers. Pham was due to bat second in the ninth with a chance for history. He already had become the 18th player in World Series to go 4-for-4, but no one had ever gotten that fifth hit in five at-bats.

Pham walked up to Lovullo in the dugout.

He had a request.

He wanted to come out of the game as the designated hitter. Please, he asked, give his at-bat to Jace Peterson, a fellow journeyman, who had never had a World Series plate appearance.

"I need you to give my boy an AB," Pham told Lovullo.

Lovullo: "Are you sure you want this to happen. You 100% sure?"

Pham: "I need my boy to get an at-bat in the World Series. He'll remember this for the rest of his life. ... You may or may not use him in another role, but right now I want to step aside for him."

Lovullo, unaware there was a chance for history, reluctantly agreed, but told him that if the Rangers scored another run or two in the bottom of the eighth inning, Pham would remain in the game.

"Look, me and him have close to nine years of service in this game, and it took us nine years to get the World Series," Pham said. "Who knows if we'll get this chance again. I've gotten to play. I've gotten my hits. I wanted to make sure Jace had this experience, too."

"I had to get my dawg in."

Peterson, who knew Pham from a distance, but never got to know him until they were each traded to Arizona at the deadline, was stunned. The only player who ever did that for him was Adam Jones when they were together in Baltimore in 2018 when Peterson was trying to reach some contract incentives.

But those were in regular-season games when the Orioles were out of the race.

To do it now?

In a World Series game?

"This was a moment where it was a teammate loving a teammate," Lovullo said, "to give him an opportunity. He took what mattered most to him personally and said, 'It's more about the team and my teammate at this moment.'"

It was this act of unselfishness that overshadowed the moment when Pham was caught wandering off second base.



Tommy Pham reacts after hitting a double in the fourth inning of Game 2 against the Texas Rangers. RAYMOND CARLIN III/USA TODAY SPORTS

He was picked off, and the FOX-TV cameras caught Rangers pitching coach Mike Maddux's reaction.

"Atta boy, you dumb (expletive)."

Pham, who played for the Cardinals in St. Louis in 2018 when Maddux was the pitching coach, says he was stunned, a bit hurt, and certainly disappointed by Maddux's reaction.

"I was just a little shocked that he would say that," Pham told USA TODAY Sports. "I get it. Heat of the moment. But he knows me. He knows me well."

"I'm just shocked at that. I would expect him to be a little bit better."

When asked if he would speak to Maddux, Pham declined and said, "Success is the ultimate revenge. So, let's just try to beat him. I'll try to let my game do my talking."

When reached before the Rangers' workout Sunday at Chase Field, Maddux was apologetic, saying he certainly didn't intend to demean Pham, particularly knowing him from their Cardinals' days with both of them also grow-

ing up in Las Vegas.

"He's a pro's pro, who plays the game the right way," Maddux told USA TODAY Sports in a text message. "Nothing but respect for Tommy and everyone on the field. Tommy is a class player and great teammate. Our Vegas connection will always stay true."

Besides, the Rangers certainly don't need to further fuel Pham's intensity, not after going 5-for-9 the first two games with two doubles and a homer. Pham joined future Hall of Famer Albert Pujols as the only players with three four-hit games in their postseason career.

"Man, me and Albert together," Pham said, "that's unbelievable."

Pham, who proved instrumental getting the D-backs into the postseason with 20 extra-base hits and 32 RBI, found himself struggling in the NLCS. He was pinch-hit for in Game 4 against Philadelphia, and benched in Game 5.

He aired his grievances with Lovullo, and came back with a vengeance, hit-

ting a homer in his first at-bat in Game 6.

"It wasn't pretty," Pham said of his meeting with Lovullo. "But it was an honest exchange. It was healthy."

Said D-backs first baseman Christian Walker: "A lot of people dance around the truth these days. Tommy's not that guy."

It's this fiery disposition, aside from his talent, that led the D-backs to take a last-minute run at Pham before the Aug. 1 deadline. Diamondbacks GM Mike Hazen didn't even make a call to then-new York Mets GM Billy Eppler. They were focused on trying to acquire a starting pitcher, and only after landing closer Paul Sewald from the Seattle Mariners, did Hazen reach out.

The Mets placed Pham on the trade block weeks earlier, but until the D-backs called just two hours before the 6 p.m. ET, Aug. 1 trade deadline, the Mets had only three teams who even exchanged names for Pham.

The D-backs wound up giving up only 17-year-old shortstop Jeremy Rodriguez, who wasn't even among their top 30 prospects, with the Mets agreeing to pay half of Pham's remaining \$6 million contract.

"I was a little bit surprised," Hazen said. "We weren't running on multiple fronts during the course of the day. We knew we wanted a position player, but the pitcher was the biggest priority for us. So by the time we knew we hadn't gotten a starter, and we had gotten Sewald, that's when we turned our attention to a position player."

"He's exactly the fit in the clubhouse we were hoping he'd be. He's got an edge to him, and the players love him."

Pham's popularity soared overnight when his teammates learned of his gesture, with Pham making it public simply to stop the criticism of Lovullo, with fans believing he was the one responsible for denying Pham the chance for history.

"I'm not on Twitter," Lovullo said. "I'm not on social media. But my family will send me things."

"And I guess I was the idiot in the room that took Tommy Pham out of the game to be the first guy to get five hits."

The truth is that no one knew it would be a World Series record, and while Pham said it wouldn't have altered his decision, it may have affected everyone else's.

"If I had known that," Peterson said, "I probably would have said, 'No! You're going to change this record.' I had no idea, honestly. For me, it was just him being a great teammate and showing what kind of guy he is."

"There's a respect for each other and the way we go about it. I mean, I would do anything for him and I feel like he would do anything for me in any situation, whether it's in baseball or outside baseball."

But, the guy had a chance to carve his name in the record book, accomplishing a feat that not even Babe Ruth, Willie Mays, Hank Aaron, Tony Gwynn or any all-time great managed to do in a World Series game.

"It's awesome, records are unbelievable," Peterson said, "but for me, and I'll speak for him, all that matters is getting that ring. That's why we play the game."

When the World Series is over, Peterson plans to express his gratitude with a present, but sorry, there's no need for a surprise.

Pham knows exactly what he wants, and it's much, much more than a couple of fantasy football championships.

"I was always hoping to be in the World Series," Pham said, "and now that we're here, I want to take advantage of this opportunity. You never know if it's going to come around again."

"We're not done yet."

"Not until we get that ring."

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**Organization:** Canoe Procurement Group of Canada

**Organization Address:**

**Reference Number:** AB-2023-06451

**Solicitation Number:** AB-2023-06451

**Solicitation Type:** Request for Proposal

**Posting (MM/dd/yyyy):** 10/31/2023  
12:00:00 PM Alberta Time

**Closing (MM/dd/yyyy):** 12/19/2023  
03:30:00 PM Alberta Time

**Last Update (MM/dd/yyyy):** 10/31/2023  
11:46:12 AM Alberta Time

**Agreement Type:** NWP/TA/TILMA & CFTA & CETA & TCA

**Region of Opportunity:** Open

**Region of Delivery:** Alberta

**Opportunity Type:** Open & Competitive

**Commodity Codes:**  
 N7030: ADP Software  
 N5810500: Communications Security Equipment and Components (COMSEC) Secure Controller Systems  
 N5810100: Communications Security Equipment and Components (COMSEC) Secure Terminal Systems  
 N7022: ADP Central Processing Unit (CPU, Computer) Hybrid  
 N5810: Communications Security Equipment and Components  
 N7021: ADP Central Processing Unit (CPU, Computer) Digital  
 N7010126: COMPUTERS, MICRO, LAPTOP  
 N5810050: Communications Security Equipment and Components (COMSEC) Secure Voice/Data Systems  
 AJ212528: Computer Systems Security (R&D)  
 N5810020: Terminals, Multimedia, Communications Security Equipment  
 N7025150: Monitor, CRT or LCD, Microcomputer Etc.  
 N7030AJA: COMPUTER SOFTWARE, SECURITY, PRIVACY, ENCRYPTION, AUDIT CONTROLS/AIDS - MICROCOMPUTERS ONLY  
 N7030100: Software Suppliers, Application, Business, Personnel Management, EDP  
 N7025: ADP Input-Output and Storage Devices  
 N7035115: SWITCHING DEVICES (DATA, MODEMS, PERIPHERALS, VIDEO ETC.)  
 N7020: ADP Central Processing Unit (CPU, Computer) Analog  
 N7020100: COMPUTER CPU, ANALOG  
 N7010130: COMPUTERS, DIGITAL SYSTEMS, SPECIAL PURPOSE, INCLUDES ARTIFICIAL INTELLIGENCE, ARRAY, PARALLEL, VECTOR ETC.  
 K105AM: Security Risk Analysis  
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**Bid RFP #121923 - Technology Products and Services with Related Solutions**

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**Bid Type** RFP

**Bid Number** 121923

**Title** Technology Products and Services with Related Solutions

**Start Date** Oct 31, 2023 8:54:19 AM CDT

**End Date** Dec 19, 2023 4:30:00 PM CST

**Agency** Sourcewell

**Bid Contact** Tara Wolff  
 (218) 541-5362  
 rfp@sourcewell-mn.gov  
 202 12th Street NE  
 P.O. Box 219  
 Staples, MN 56479-0219

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0 Questions  
 0 Unanswered  
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**Description**

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**Pre-Bid Conference**

**Date** Nov 28, 2023 10:00:00 AM CST

**Location** Online Conference

**Notes** Login information will be emailed two business days prior to the event.

**Documents**



No Documents for this bid

## View Details

Click [here](#) to return to the Sourcewell Procurement Portal home page.

**Bid Details**

<p>Bid Classification:</p> <p>Bid Type:</p> <p>Bid Number:</p> <p>Bid Name:</p> <p>Bid Status:</p> <p>Bid Closing Date:</p> <p>Question Deadline:</p> <p>Electronic Auctions:</p> <p>Language for Bid Submissions:</p> <p>Submission Type:</p> <p>Submission Address:</p> <p>Public Opening:</p> <p>Public Opening Address:</p> <p>Description:</p>	<p>Goods</p> <p>RFP - General</p> <p>RFP 121923</p> <p>Technology Products and Services with Related Solutions</p> <p><b>Closed</b></p> <p>Tue Dec 19, 2023 4:30:00 PM (CST)</p> <p>Mon Dec 11, 2023 4:30:00 PM (CST)</p> <p>Not Applicable</p> <p>English unless specified in the bid document</p> <p>Online Submissions Only</p> <p>Online Submissions Only</p> <p>Yes</p> <p>See RFP and FAQ documents for details.</p> <p>Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for <b>Technology Products and Services with Related Solutions</b> to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<a href="https://portal.sourcewell-mn.gov">https://portal.sourcewell-mn.gov</a>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than <b>December 19, 2023, at 4:30 p.m. Central Time</b>, and late proposals will not be considered.</p> <p>Bid Document Access:</p> <p>Bid Opportunity notices and awards and a free preview of the bid documents is available on this site free of charge without registration. Please note, some documents may be secured and you will be required to register for the bid to download and view the documents. There is no cost to obtain an unsecured version of the document and /or to participate in this solicitation.</p> <p>Categories:</p> <p><a href="#">Show Categories [+]</a></p>
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 Register for this Bid
 Download Bid Documents

## Meeting Locations

The following are the meeting times and locations for the opportunity:

Meeting Location	Description	Date / Time	Mandatory Me...	Meeting Document
Online Pre-Proposal Conference	Login instructions will be posted to the "Documents" section and available to registered suppliers two business days prior to the web conference.	Tuesday November 28, 2023 10:00 AM (CST)	No	



Register

View Edit Delete Revisions

OPEN

### Technology Products and Services with Related Solutions

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Technology Products and Services with Related Solutions to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://proportal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than December 19, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

#### Important Dates

Pre-Proposal Conference:  
**November 28, 2023 at 10:00 am CST**

Proposals Due:  
**December 19, 2023 at 4:30 pm CST**

To obtain a copy of the complete RFP, ask questions related to the RFP, or submit a proposal, please use the link below.

[Sourcewell Procurement Portal](#)



**Publish**

- Bid Announcements
- Doc. Taker's List

**Bidding** Type 1 Bid Notice Only

**Publish** /Verify Contents Save as Template

**Solicitation Setting**

- Invite Bidders No
- Evaluate Response online No
- Internal Approval No
- Enable Collaboration with other Users No

**Solicitation Details**

Mandatory Information			
Solicitation Type	RFP	Solicitation Number	121923
Solicitation Name	Technology Products and Services with Related Solutions	Procurement Type	Goods , Services
Country & Province/State	Canada / Ontario	Published By	Sourcewell
Accept Questions	Not Applicable		

Internal Information (For Internal Use Only)	
Procurement Title/Project Name	121923 Technology Products


**Advertisement**

Basic Settings			
Solicitation Type	Open to all suppliers	Estimated Contract Amount	\$8,000,000,000.00
Publish Date	10/31/2023	Closing Date & Time	12/19/2023 16:30:00 CT
Publish Option	Value Range for this Solicitation 10,000,001 over		

Selected Categories	
<b>Computers</b>	
Computer Hardware	Hardware, peripherals and accessories, servers, GPS receivers, refurbished computers, chargers, system storage, I/O Storage, Interactive Response System etc



**Solicitation Overview**



**Technology Products and Services with Related Solutions**

121923

**Closing Date: 12/19/2023 04:30:00 PM CT**

**Detail:**

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for **Technology Products and Services with Related Solutions** to result in a contracting solution for use by its **Participating Entities**. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://portal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than December 19, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

X

- ① Preview
- ② Amendments
- ③ Bid Results
- ④ Award
- ⑤ Audit



## Preview

Print

Notice Categories

### Basic Information

**Estimated Contract Value (CAD)**  
8,000,000,000.00 (Not shown to suppliers)

**Reference Number**  
0000258693

**Issuing Organization**  
Sourcewell

**Solicitation Type**  
RFP - Request for Proposal (Formal)

**Solicitation Number**  
121923

**Title**  
Technology Products and Services with Related Solutions

**Source ID**  
PP.CO.USA.868485.C88455

### Details

**Location**  
Canada, All of Canada, All of Canada

**Purchase Type**  
Duration: 4 years

### Dates

**Publication Date**  
2023/10/31 09:41:21 AM EDT

**Question Acceptance Deadline**  
2023/12/11 05:30:00 PM EST

**Questions are submitted online**  
No

**Closing Date**  
2023/12/19 05:30:00 PM EST

**Bid Intent**  
Not Available

**Prebid Conference**  
2023/11/28 11:00:00 AM EST

### Contact Information

Procurement Department  
rfp@sourcewell-mn.gov

218-894-1930

### Description

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Technology Products and Services with Related Solutions to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government... [See more](#)

### Pre-Bidding Events

<b>Event Type</b> Prebid Conference	<b>Attendance</b> Recommended
<b>Event date</b> 2023/11/28 11:00:00 AM EST	<b>Location</b> Online Conference
<b>Event Note</b> Login information will be emailed two business days prior to the event.	

### Bid Submission Process

**Bid Submission Type**  
Electronic Bid Submission

**Pricing**  
In attached document

#### Bid Documents List

Item Name	Description	Mandatory	Limited to 1 file
Bid Documents	Documents defining the proposal	Yes	No



**RFP #121923**  
**REQUEST FOR PROPOSALS**  
**for**  
**Technology Products and Services with Related Solutions**

**Proposal Due Date: December 19, 2023, 4:30 p.m., Central Time**

Sourcewell, a State of Minnesota local government unit and service cooperative, is requesting proposals for Technology Products and Services with Related Solutions to result in a contracting solution for use by its Participating Entities. Sourcewell Participating Entities include thousands of governmental, higher education, K-12 education, nonprofit, tribal government, and other public agencies located in the United States and Canada. A full copy of the Request for Proposals can be found on the Sourcewell Procurement Portal [<https://proportal.sourcewell-mn.gov>]. Only proposals submitted through the Sourcewell Procurement Portal will be considered. Proposals are due no later than December 19, 2023, at 4:30 p.m. Central Time, and late proposals will not be considered.

**SOLICITATION SCHEDULE**

Public Notice of RFP Published:	October 31, 2023
Pre-proposal Conference:	November 28, 2023, 10:00 a.m., Central Time
Question Submission Deadline:	December 11, 2023, 4:30 p.m., Central Time
<b>Proposal Due Date:</b>	December 19, 2023, 4:30 p.m., Central Time Late responses will not be considered.
Opening:	December 19, 2023, 4:30 p.m., Central Time See RFP Section V.G. "Opening"

## I. ABOUT SOURCEWELL

### A. SOURCEWELL

Sourcewell is a State of Minnesota local government unit and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) that facilitates a competitive public solicitation and contract award process for the benefit of its 50,000+ participating entities across the United States and Canada. Sourcewell's solicitation process complies with State of Minnesota law and policies, conforms to Canadian trade agreements (including Canadian Free Trade Agreement, Ontario-Quebec Trade and Cooperation Agreement, and Canada-European Union Comprehensive Economic and Trade Agreement, as applicable), and results in cooperative purchasing solutions from which Sourcewell's Participating Entities procure equipment, products, and services.

Cooperative purchasing provides participating entities and suppliers increased administrative efficiencies and the power of combined purchasing volume that result in overall cost savings. At times, Sourcewell also partners with other purchasing cooperatives to combine the purchasing volume of their membership into a single solicitation and contract expanding the reach of contracted suppliers' potential pool of end users.

Sourcewell uses a website-based platform, the Sourcewell Procurement Portal, through which all proposals to this RFP must be submitted.

### B. USE OF RESULTING CONTRACTS

In the United States, Sourcewell's contracts are available for use by:

- Federal and state government entities<sup>1</sup>;
- Cities, towns, and counties/parishes;
- Education service cooperatives;
- K-12 and higher education entities;
- Tribal government entities;
- Some nonprofit entities; and
- Other public entities.

In Canada, Sourcewell's contracts are available for use by:

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<sup>1</sup> Pursuant to HAR §3-128-2, the State of Hawaii, Department of Accounting and General Services, State Procurement Office, on behalf of the State of Hawaii and participating jurisdictions, has provided notice of its Intent to Participate in the solicitation as a participating entity.

- Provincial and territorial government departments, ministries, agencies, boards, councils, committees, commissions, and similar agencies;
- Indigenous self-governing bodies;
- Regional, local, district, and other forms of municipal government, municipal organizations, school boards, and publicly funded academic, health, and social service entities referred to as MASH sector (this should be construed to include but not be limited to the Cities of Calgary, Edmonton, Toronto, Ottawa, and Winnipeg), as well as any corporation or entity owned or controlled by one or more of the preceding entities;
- Crown corporations, government enterprises, and other entities that are owned or controlled by these entities through ownership interest; and
- Members of the Canoe procurement group of Canada, and their partner associations: Canoe members are regional, local, district or other forms of municipal government, school boards, publicly-funded academic, health and social service entities in Alberta and across Canada, as well as any corporation or entity owned or controlled by one or more of the preceding entities – as well as partner associations, including Saskatchewan Association of Rural Municipalities, Association of Manitoba Municipalities, Local Authorities Services/Association of Municipalities Ontario, Nova Scotia Federation of Municipalities, Federation of Prince Edward Island Municipalities, Municipalities Newfoundland Labrador, Union of New Brunswick Municipalities, North West Territories Association of Communities, CivicInfo BC, and their members.

For a listing of current United States and Canadian Participating Entities visit Sourcewell's website (note: there is a tab for each country): <https://www.sourcewell-mn.gov/sourcewell-for-vendors/agency-locator>.

Participating Entities typically access contracted equipment, products, or services through a purchase order issued directly to the contracted supplier. A Participating Entity may request additional terms or conditions related to a purchase. Use of Sourcewell contracts is voluntary and Participating Entities retain the right to obtain similar equipment, products, or services from other sources.

To meet Participating Entities' needs, Sourcewell broadly publishes public notice of all solicitation opportunities, including this RFP. In addition, where applicable, other purchasing cooperatives and procurement officials receive notice and are encouraged to re-post the solicitation opportunity.

Proof of publication will be available at the conclusion of the solicitation process.

## **II. SOLICITATION DETAILS**

### **A. SOLUTIONS-BASED SOLICITATION**

This RFP and contract award process is a solutions-based solicitation; meaning that Sourcewell is seeking equipment, products, or services that meet the general requirements of the scope of this RFP and that are commonly desired or are required by law or industry standards.

B. REQUESTED EQUIPMENT, PRODUCTS, OR SERVICES

It is expected that proposers will offer a wide array of equipment, products, or services at lower prices and with better value than what they would ordinarily offer to a single government entity, a school district, or a regional cooperative.

1. Sourcewell is seeking proposals for Technology Products and Services with Related Solutions. Awards under this solicitation for Technology Products and Services with Related Solutions will be in three (3) categories. Proposers submitting a proposal in Category 1 as defined herein must include at least one solution in each of Categories 1, 2, and 3 within its singular proposal. For example, if a Proposer offers solutions within the scope of Category 1, 2 and 3 the Proposer should designate it is seeking an award in Category 1. Proposers seeking award in Category 2 and/or 3 as defined herein must include at least one solution offered within the scope of the desired Category.

Category 1: Technology Products and Services with Related Solutions, such as:

- a. Computer hardware, including desktops, laptops, tablets, and related devices;
- b. Networking, server, and data storage equipment, including servers, server appliances, racks and cabinets, data storage or data protection devices, and switching technology;
- c. Peripherals, accessories, components, and options, including printers, scanners, monitors, audio visual, digital signage, virtual reality, Esports equipment, unified communication hardware, mobility hardware, cabling, modems, routers, switches, power management, and supplies;
- d. Software related to the purchase of the equipment described in Section 1a. - c. above;
- e. Configuration, software implementation, hardware installation, support, assessment, training, and asset lifecycle services related to the purchase of the equipment or software described in Section 1 a.- d. above; and
- f. Security, cloud, network, data, IT asset lifecycle services, and solutions described in Categories 2 and 3 below.

Proposers responding to Category 1 must offer a complete electronic catalog system permitting Sourcewell and Sourcewell Participating Entities to make web-based purchases for

solutions defined in Category 1. The catalog must be designed to populate with the Sourcewell and Sourcewell Participating Entities pricing offered by the proposer. Alternate forms of transaction (e.g., PO and invoice transactions) are a permissible ancillary service method.

Category 2: Security, Cloud, Network, and Data Services with Related Solutions, including, but not limited to:

- a. Cybersecurity services, such as cyber risk assessments, program strategy and operations, zero trust, skills and training, penetration testing, threat and vulnerability management, content security, network visibility and endpoint detection, log aggregation and correlation, disaster response and recovery, and managed cybersecurity;
- b. Physical security services, such as site assessment, upgrade planning and execution design, installation, integration, access control, video management, and managed physical security services;
- c. Cloud, such as Infrastructure as a Service (IaaS), Platform as a Service (PaaS), Software as a Service (SaaS), and strategy, design, migration, deployment, and managed cloud solutions;
- d. Network, such as maintenance and monitoring, edge computing, SD-WAN and LAN, and data center networking;
- e. Data, such as data modernization, data backup, data and document processing and storage, and assessment, validation, production, and management of AI and machine learning solutions; and
- f. Related solutions, such as endpoint security products, network security technologies, identity and access management technologies, security analytics, data security products, IP video monitoring systems, intelligent controllers, mission control systems, electronic locks, network infrastructure, and server room technology.

Proposers may include related equipment, accessories, and technology to the extent that these solutions are ancillary or complementary to the services and solutions being proposed in Category 2 above.

The primary focus of Category 2 is on security, cloud, network, and data services. This category should NOT be construed to include:

- a. Products or accessories-only solutions
- b. Software-as-a-Service (SaaS)-only solutions
- c. Staff Augmentation

Category 3: IT Lifecycle Services, such as:

- a. IT Asset Management Services, including hardware and software asset management, software as a service management, audit management, maturity assessments, sustainability solutions, and repair and maintenance;
- b. IT datacenter decommissioning, including planning and valuation, data shredding, de-racking, de-cabling, de-powering, and packing; and,
- c. IT Asset Disposal and Retirement Services, including secure data destruction, serialization, asset value recovery, recycling, remarketing, refurbishing, onsite collection, and ESG reporting.

Proposers may include related equipment, software, technology, accessories, and services to the extent that these solutions are ancillary or complementary to the services being proposed in Category 3 above.

2. This solicitation does not include those equipment, products, or services covered under categories included in contracts currently maintained by Sourcewell:

- a. Communications Technology Consulting Services (RFP #072822) with the exception of those ancillary or complementary to Categories 1-3 above.

Generally, the solutions for Participating Entities are turn-key solutions, providing a combination of equipment, products and services, delivery, and installation to a properly operating status. However, equipment-only or products-only solutions may be appropriate for situations where Participating Entities possess the ability, either in-house or through local third-party contractors, to properly install and bring to operation the equipment or products being proposed.

Sourcewell prefers suppliers that provide a sole source of responsibility for the equipment, products, and services provided under a resulting contract. If proposer is including the equipment, products, and services of its subsidiary entities, the proposer must also identify all included subsidiaries in its proposal. If proposer requires the use of distributors, dealers, resellers, or subcontractors to provide the equipment, products, or services, the proposal must address how the equipment, products or services will be provided to Participating Entities, and describe the network of distributors, dealers, resellers, and/or subcontractors that will be available to serve Participating Entities under a resulting contract.

Sourcewell encourages suppliers to offer the broadest possible selection of equipment, products, and services being proposed over the largest possible geographic area and to the largest possible cross-section of Sourcewell current and future Participating Entities.

### C. REQUIREMENTS

It is expected that proposers have knowledge of all applicable industry standards, laws, and regulations and possess an ability to market and distribute the equipment, products, or services to Participating Entities.

1. Safety Requirements. All items proposed must comply with current applicable safety or regulatory standards or codes.
2. Deviation from Industry Standard. Deviations from industry standards must be identified with an explanation of how the equipment, products, and services will provide equivalent function, coverage, performance, and/or related services.
3. New Equipment and Products. Proposed equipment and products must be for new, current model; however, proposer may offer certain close-out equipment or products if it is specifically noted in the Pricing proposal.
4. Delivered and operational. Unless clearly noted in the proposal, equipment and products must be delivered to the Participating Entity as operational.
5. Warranty. All equipment, products, supplies, and services must be covered by a warranty that is the industry standard or better.

### D. PROSPECTIVE CONTRACT TERM

The term of any resulting contract(s) awarded by Sourcewell under this solicitation will be four years. Sourcewell and supplier may agree to up to three additional one-year extensions based on the best interests of Sourcewell and its Participating Entities. Sourcewell retains the right to consider additional extensions beyond seven years as required under exceptional circumstances.

### E. ESTIMATED CONTRACT VALUE AND USAGE

Based on past volume of similar contracts, the estimated annual value of all transactions from contracts resulting from this RFP are anticipated to be USD \$1.5 Billion for Category 1, \$500 Million for Category 2, and \$50 Million for Category 3. Therefore, proposers are expected to propose volume pricing. Sourcewell anticipates considerable activity under the contract(s) awarded from this RFP; however, sales and sales volume from any resulting contract are not guaranteed.

### F. MARKETING PLAN

Proposer's sales force will be the primary source of communication with Participating Entities. The proposer's Marketing Plan should demonstrate proposer's ability to deploy a sales force

or dealer network to Participating Entities, as well as proposer's sales and service capabilities. It is expected that proposer will promote and market any contract award.

#### G. ADDITIONAL CONSIDERATIONS

1. Contracts will be awarded to proposers able to best meet the need of Participating Entities. Proposers should submit their complete line of equipment, products, or services that are applicable to the scope of this RFP.
2. A proposer may submit only one proposal. If related, affiliated, or subsidiary entities elect to submit separate proposals, rather than a single parent-entity proposal, each such proposal must be prepared independently and without cooperation, collaboration, or collusion.
3. If a proposer works with a consultant on its proposal, the consultant (an individual or company) may not assist any other entity with a proposal for this solicitation.
4. Proposers should include all relevant information in its proposal, since Sourcewell cannot consider information that is not included in the proposal. Sourcewell reserves the right to verify proposer's information and may request clarification from a proposer, including samples of the proposed equipment or products.
5. Proposers including solutions offered within the scope of Categories 1, 2, and 3 within its singular proposal must designate they are seeking award in Category 1 in the Sourcewell Procurement Portal. Proposers seeking award in Category 2 and/or 3 as defined herein must make that designation in the Sourcewell Procurement Portal. Proposers may only receive an award within the Category(-ies) they designate. Sourcewell reserves the right to re-categorize any designation as it deems appropriate.
6. A proposer's documented negative past performance with Sourcewell or its Participating Entities occurring under a previously awarded Sourcewell contract may be considered in the evaluation of a proposal.

### III. PRICING

#### A. REQUIREMENTS

All proposed pricing must be:

1. Either Line-Item Pricing or Percentage Discount from Catalog Pricing, or a combination of these:
  - a. **Line-item Pricing** is pricing based on each individual product or services. Each line must indicate the proposer's published "List Price," as well as the "Contract Price."
  - b. **Percentage Discount from Catalog or Category** is based on a percentage discount from a catalog or list price, defined as a published Manufacturer's Suggested Retail Price (MSRP) for the products or services. Individualized percentage discounts can be applied to any number of defined product groupings. Proposers will be responsible for providing and maintaining current published MSRP with Sourcewell,

and this pricing must be included in its proposal and provided throughout the term of any contract resulting from this RFP.

2. The proposer's not to exceed price. A not to exceed price is the highest price for which equipment, products, or services may be billed to a Participating Entity. However, it is permissible for suppliers to sell at a price that is lower than the contracted price.
3. Stated in U.S. and Canadian dollars (as applicable).
4. Clearly understandable, complete, and fully describe the total cost of acquisition (e.g., the cost of the proposed equipment, products, and services delivered and operational for its intended purpose in the Participating Entity's location).

Proposers should clearly identify any costs that are NOT included in the proposed product or service pricing. This may include items such as installation, set up, mandatory training, or initial inspection. Include identification of any parties that impose such costs and their relationship to the proposer. Additionally, proposers should clearly describe any unique distribution and/or delivery methods or options offered in the proposal.

#### B. ADMINISTRATIVE FEES

Proposers awarded a contract are expected to pay to Sourcewell an administrative fee in exchange for Sourcewell facilitating the resulting contracts. The administrative fee is normally calculated as a percentage of the total sales to Participating Entities for all contracted equipment, products, or services made during a calendar quarter, and is typically one percent (1%) to two percent (2%). In some categories, a flat fee may be an acceptable alternative.

### IV. CONTRACT

Proposers awarded a contract will be required to execute a contract with Sourcewell (see attached template). Only those modifications the proposer indicates in its proposal will be available for discussion. Much of the language in the Contract reflects Minnesota legal requirements and cannot be altered. Numerous and/or onerous exceptions that contradict Minnesota law may result in the proposal being disqualified from further review and evaluation.

To request a modification to the template Contract, a proposer must submit the Exceptions to Terms, Conditions, or Specifications table with its proposal. Only those exceptions noted at the time of the proposal submission will be considered.

Exceptions must:

1. Clearly identify the affected article and section.
2. Clearly note the requested modification; and as applicable, provide requested alternative language.

Unclear requests will be automatically denied.

Only those exceptions that have been accepted by Sourcewell will be included in the contract document provided to the awarded supplier for signature.

If a proposer receives a contract award resulting from this solicitation it will have up to 30 days to sign and return the contract. After that time, at Sourcewell's sole discretion, the contract award may be revoked.

## **V. RFP PROCESS**

### **A. PRE-PROPOSAL CONFERENCE**

Sourcewell will hold an optional, non-mandatory pre-proposal conference via webcast on the date and time noted in the Solicitation Schedule for this RFP and on the Sourcewell Procurement Portal. The purpose of this conference is to allow potential proposers to ask questions regarding this RFP and Sourcewell's competitive contracting process. Information about the webcast will be sent to all entities that have registered for this solicitation opportunity through their Sourcewell Procurement Portal Vendor Account. Pre-proposal conference attendance is optional.

### **B. QUESTIONS REGARDING THIS RFP AND ORAL COMMUNICATION**

All questions regarding this RFP must be submitted through the Sourcewell Procurement Portal. The deadline for submission of questions is found in the Solicitation Schedule and on the Sourcewell Procurement Portal. Answers to questions will be issued through an addendum to this RFP. Repetitive questions will be summarized into a single answer and identifying information will be removed from the submitted questions.

All questions, whether specific to a proposer or generally related to the RFP, must be submitted using this process. Do not contact individual Sourcewell staff to ask questions or request information as this may disqualify the proposer from responding to this RFP. Sourcewell will not respond to questions submitted after the deadline.

### **C. ADDENDA**

Sourcewell may modify this RFP at any time prior to the proposal due date by issuing an addendum. Addenda issued by Sourcewell become a part of the RFP and will be delivered to potential proposers through the Sourcewell Procurement Portal. Sourcewell accepts no liability in connection with the delivery of any addenda.

Before a proposal will be accepted through the Sourcewell Procurement Portal, all addenda, if any, must be acknowledged by the proposer by checking the box for each addendum. It is the responsibility of the proposer to check for any addenda that may have been issued up to the solicitation due date and time.

If an addendum is issued after a proposer submitted its proposal, the Sourcewell Procurement Portal will WITHDRAW the submission and change the proposer's proposal status to INCOMPLETE. The proposer can view this status change in the "MY BIDS" section of the Sourcewell Procurement Portal Vendor Account. The proposer is solely responsible to check the "MY BIDS" section of the Sourcewell Procurement Portal Vendor Account periodically after submitting its proposal (and up to the Proposal Due Date). If the proposer's proposal status has changed to INCOMPLETE, the proposer is solely responsible to:

- i) make any required adjustments to its proposal;
- ii) acknowledge the addenda; and
- iii) ensure the re-submitted proposal is received through the Sourcewell Procurement Portal no later than the Proposal Due Date and time shown in the Solicitation Schedule above.

#### D. PROPOSAL SUBMISSION

Proposer's complete proposal must be submitted through the Sourcewell Procurement Portal no later than the date and time specified in the Solicitation Schedule. Any other form of proposal submission, whether electronic, paper, or otherwise, will not be considered by Sourcewell. **Late proposals will not be considered.** It is the proposer's sole responsibility to ensure that the proposal is received on time.

It is recommended that proposers allow sufficient time to upload the proposal and to resolve any issues that may arise. The time and date that a proposal is received by Sourcewell is solely determined by the Sourcewell Procurement Portal web clock.

In the event of problems with the Sourcewell Procurement Portal, follow the instructions for technical support posted in the portal. It may take up to 24 hours to respond to certain issues.

Upon successful submission of a proposal, the Sourcewell Procurement Portal will automatically generate a confirmation email to the proposer. If the proposer does not receive a confirmation email, contact Sourcewell's support provider at [support@bidsandtenders.ca](mailto:support@bidsandtenders.ca).

To ensure receipt of the latest information and updates via email regarding this solicitation, or if the proposer has obtained this solicitation document from a third party, the onus is on the proposer to create a Sourcewell Procurement Portal Vendor Account and register for this solicitation opportunity.

Within the Sourcewell Procurement Portal, all proposals must be digitally acknowledged by an authorized representative of the proposer attesting that the information contained in the proposal is true and accurate. By submitting a proposal, proposer warrants that the information provided is true, correct, and reliable for purposes of evaluation for potential contract award. The submission of inaccurate, misleading, or false information is grounds for disqualification from a contract award and may subject the proposer to remedies available by law.

## E. GENERAL PROPOSAL REQUIREMENTS

Proposals must be:

- In substantial compliance with the requirements of this RFP or it will be considered nonresponsive and be rejected.
- Complete. A proposal will be rejected if it is conditional or incomplete.
- Submitted in English.
- Valid and irrevocable for 90 days following the Proposal Due Date.

Any and all costs incurred in responding to this RFP will be borne by the proposer.

## F. PROPOSAL WITHDRAWAL

Prior to the proposal deadline, a proposer may withdraw its proposal.

## G. OPENING

The Opening of proposals will be conducted in the Sourcewell Procurement Portal immediately following the proposal due date and time. To view the list of proposers resulting from the opening, verify that the Sourcewell Procurement Portal opportunities list search is set to "All" or "Closed."

Members of the public may attend the Opening at Sourcewell's office located at 202 12th Street NE, Staples, MN to hear the results.

# VI. EVALUATION AND AWARD

## A. EVALUATION

It is the intent of Sourcewell to award one or more contracts to responsive and responsible proposers offering the best overall quality, selection of equipment, products, and services, and price that meet the commonly requested specifications of Sourcewell and its Participating Entities. The award(s) will be limited to the number of proposers that Sourcewell determines is necessary to meet the needs of its Participating Entities.

Factors to be considered in determining the number of contracts to be awarded in any category may include the following:

- Total evaluation scores (giving consideration to natural breaks in the scoring of responsive proposals);
- The number and geographic location of highest-scoring proposers that offer:
  - A comprehensive selection of the requested equipment, products, or services;

- A sales and service network ensuring availability and coverage for Participating Entities' use; and
- Other attributes of the proposer or contents of its proposal that assist Participating Entities in achieving environmental and social requirements, and goals.

Information submitted as part of a proposal should be as specific as possible when responding to the RFP. Do not assume Sourcewell has any knowledge about a specific supplier or product.

**B. AWARD(S)**

Award(s) will be made to the highest-scoring proposer(s) in each category whose proposal conforms to all conditions and requirements of the RFP, and consistent with the award criteria defined in this RFP.

Sourcewell may request written clarification of a proposal at any time during the evaluation process.

Proposal evaluation will be based on the following scoring criteria and the Sourcewell Evaluator Scoring Guide (a copy is available in the Sourcewell Procurement Portal):

Conformance to RFP Requirements	50
Financial Viability and Marketplace Success	75
Ability to Sell and Deliver Service	100
Marketing Plan	50
Value Added Attributes	75
Warranty and Performance Standards or Guarantees	50
Depth and Breadth of Offered Equipment, Products, or Services	200
Pricing	400
<b>TOTAL POINTS</b>	<b>1000</b>

**C. PROTESTS OF AWARDS**

Any protest made under this RFP by a proposer must be in writing, addressed to Sourcewell's Executive Director, and delivered to the Sourcewell office located at 202 12th Street NE, P.O. Box 219, Staples, MN 56479. All documents that comprise the complete protest package must be received, and time stamped at the Sourcewell office by 4:30 p.m., Central Time, no later than 10 calendar days following Sourcewell's notice of contract award(s) or non-award. A protest must allege a procedural, technical, or legal defect, with supporting documentation. A protest that merely requests a re-evaluation of a proposal's content will not be entertained

A protest must include the following items:

- The name, address, and telephone number of the protester;

- Identification of the solicitation by RFP number;
- A precise statement of the relevant facts;
- Identification of the alleged procedural, technical, or legal defect;
- Analysis of the basis for the protest;
- Any additional supporting documentation;
- The original signature of the protester or its representative; and
- Protest bond in the amount of \$20,000 (except where prohibited by law or treaty).

Protests that do not address these elements will not be reviewed.

#### D. RIGHTS RESERVED

This RFP does not commit Sourcewell to award any contract, and a proposal may be rejected if it is nonresponsive, conditional, incomplete, conflicting, or misleading. Proposals that contain false statements or do not support an attribute or condition stated by the proposer may be rejected.

Sourcewell reserves the right to:

- Modify or cancel this RFP at any time;
- Reject any and all proposals received;
- Reject proposals that do not comply with the provisions of this RFP;
- Select, for contracts or for discussion, a proposal other than that with the lowest cost;
- Independently verify any information provided in a proposal;
- Disqualify any proposer that does not meet the requirements of this RFP, is debarred or suspended by the United States or Canada, State of Minnesota, Participating Entity's state or province; has an officer, or other key personnel, who have been charged with a serious crime; or is bankrupt, insolvent, or where bankruptcy or insolvency are a reasonable prospect;
- Waive or modify any informalities, irregularities, or inconsistencies in the proposals received;
- Clarify any part of a proposal and discuss any aspect of the proposal with any proposer; and negotiate with more than one proposer;
- Award a contract if only one responsive proposal is received if it is in the best interest of Participating Entities; and
- Award a contract to one or more proposers if it is in the best interest of Participating Entities.

#### E. DISPOSITION OF PROPOSALS

All materials submitted in response to this RFP will become property of Sourcewell and will become public record in accordance with Minnesota Statutes Section 13.591, after negotiations are complete. Sourcewell considers that negotiations are complete upon execution of a resulting contract. It is the proposer's responsibility to clearly identify any data

submitted that it considers to be protected. Proposer must also include a justification for the classification citing the applicable Minnesota law. Sourcewell may reject proposals that are marked confidential or nonpublic, either substantially or in their entirety.

Sourcewell will not consider the prices submitted by the proposer to be confidential, proprietary, or trade secret materials. Financial information, including financial statements, provided by a proposer is not considered trade secret under the statutory definition.



10/31/2023

Addendum No. 1

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

---

**Question 1:**

If we have already submitted for an RFP, can and should we submit for this as well?

**Answer 1:**

The Sourcewell RFP is an open and competitive solicitation process, and each RFP is an opportunity independent of any other prior, current, or future RFP. Each proposer, in its discretion, will propose the equipment, products, or services that it deems to fall within Sourcewell's requested equipment, products, and services as described in the RFP. Only those products within the scope of the RFP will be included in any contract awarded by Sourcewell as a result of the solicitation. Each Proposal will be evaluated based on the criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 10/31/2023, is required at the time of proposal submittal.



11/02/2023

Addendum No. 2

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

If we were awarded under a different RFP, does this RFP replace that or will there be another RFP for Technology Products and Services with Related Solutions?

**Answer 1:**

The Sourcewell RFP is an open and competitive solicitation process, and each RFP is an opportunity independent of any other prior, current, or future RFP. Each proposer, in its discretion, will propose the equipment, products, or services that it deems to fall within Sourcewell's requested equipment, products, and services as described in the RFP. Only those products within the scope of the RFP will be included in any contract awarded by Sourcewell as a result of the solicitation. Each Proposal will be evaluated based on the criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/02/2023, is required at the time of proposal submittal.



11/03/2023

Addendum No. 3

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

On pg. 3 of the RFP, it states that Sourcewell's contracts are available for use by Canadian entities including provincial and territorial government departments, ministries, agencies, boards, councils, committees, commissions, and similar agencies. However, the link provided below this section indicates that Sourcewell's Canadian Participating Entities do not currently include various provincial governments, e.g., Government of Ontario. Can you please clarify this issue?

**Answer 1:**

RFP Section I. B. – Use of Resulting Contracts, identifies various types of entities eligible to participate in Sourcewell membership and to utilize resulting contracts. It is left to the discretion of any particular entity to elect to become a Sourcewell participating entity and utilize Sourcewell's contracts.

**Question 2:**

Can Sourcewell please clarify the limitations that may apply to its Canadian Participating Entities for contracting at values exceeding a certain threshold, e.g., above which the RFP cannot be used?

**Answer 2:**

Sourcewell facilitates a competitive solicitation and award process throughout North America to meet the needs and expectations of participating entities. Acceptance and use always comes down to local policy and interpretation.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/03/2023, is required at the time of proposal submittal.



11/07/2023

Addendum No. 4

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Our company does not have an e-commerce site and we wanted to know if we can respond to only section 2 of the RFP. For example, my company would like to respond only to the services portion for this RFP.

**Answer 1:**

Having an e-commerce site is a requirement for Category 1. Proposers wishing to respond to Category 2 or 3 do not have that requirement.

**Question 2:**

The RFP states Sourcewell is a service cooperative open to eligible federal, state/province, and municipal government entities, higher education, K12, nonprofit, tribal government, and other public entities located in the US and Canada. Is a Sourcewell contract holder required to sell to all eligible Sourcewell entities in the US and Canada as noted in the RFP?

**Answer 2:**

A proposer is not required to sell to all participating entities located in the US and Canada to be considered for award. Each proposer is expected to complete the table in Step 1, entitled "Ability to Sell and Service" describing their ability to serve Sourcewell

members in the United States and Canada. Proposals are evaluated based on the criteria stated in the RFP.

**Question 3:**

Page 4 of the RFP states: Proposers responding to Category 1 must offer a complete electronic catalog system permitting Sourcewell and Sourcewell Participating Entities to make web-based purchases for solutions defined in Category 1.

Is requesting quotes from us (instead of purchasing directly on a website) an acceptable purchasing process for the Sourcewell bid?

**Answer 3:**

Having an e-commerce site that allows for purchases is a requirement for Category 1. Refer to RFP Section II. B. 1. – Category 1: “Proposers responding to Category 1 must offer a complete electronic catalog system permitting Sourcewell and Sourcewell Participating Entities to make web-based purchases for solutions defined in Category 1. The catalog must be designed to populate with the Sourcewell and Sourcewell Participating Entities pricing offered by the proposer. Alternate forms of transaction (e.g., PO and invoice transactions) are a permissible ancillary service method.”

**Question 4:**

Page 9 of the RFP states: The administrative fee is normally calculated as a percentage of the total sales to Participating Entities for all contracted equipment, products, or services made during a calendar quarter, and is typically one percent (1%) to two percent (2%). In some categories, a flat fee may be an acceptable alternative.

How do we know if the admin fee for this contract is 1% or 2%?

**Answer 4:**

Refer to RFP Section III. B. – Administrative Fees, for directions on proposing an administrative fee. It is left to the discretion of each proposer to determine and propose an administrative fee that is consistent with its business and its industry.

**Question 5:**

Will our RFP provided pricing be available only behind a paywall or will it be made public?

**Answer 5:**

Refer to RFP Section VI. E. - Disposition of Proposals, for guidance on materials submitted in response to the RFP and applicable public data laws.

**Question 6:**

Under Category 1 it states Proposers responding to Category 1 must offer a complete electronic catalog system. If we do not have an online marketplace, are we excluded on providing any hardware pricing?

**Answer 6:**

See Question 1, Answer 1.

**Question 7:**

Under Category 2, on services that require hardware, does it have to be a hardware sale? Do we price it as a service?

**Answer 7:**

It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Article III - Pricing. Proposals are evaluated based on the criteria stated in the RFP.

**Question 8:**

If we do not bid on Category 1 but bid on Category 2 which may include hardware from Category 1, will we be able to fulfill the request?

**Answer 8:**

Proposers submitting a proposal in Category 1 must include at least one solution in each of Categories 1, 2, and 3. Proposers seeking award in Category 2 and/or 3 must include at least one solution offered within the scope of the desired Category.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/07/2023, is required at the time of proposal submittal.



11/08/2023

Addendum No. 5

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

How many proposer(s) are expected to be awarded for Category 1?

**Answer 1:**

Refer to RFP Section VI. A. – Evaluation, “It is the intent of Sourcewell to award one or more contracts to responsive and responsible proposers...The award(s) will be limited to the number of proposers that Sourcewell determines is necessary to meet the needs of its Participating Entities.”

**Question 2:**

Can the pre-proposal conference be moved to November 17, 2023?

**Answer 2:**

The pre-proposal conference will be held on November 28, 2023, at 10:00am Central Time. The pre-proposal conference is recorded, and a link will be sent to all registered suppliers.

**Question 3:**

With other GPO like RFXs we typically see standardized Pricing Tables with proposed items / SKUs in an Excel file format. Please provide guidance on how Proponents should specifically submit Pricing Attachments and how that provides for a fair and consistent evaluation of all submissions.

**Answer 3:**

It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Article III - Pricing. The pricing scores are arrived at by reviewing attributes including stated discounts, the value to the participating entity, clarity, and ease of use of the proposed pricing. Proposals are evaluated based on the criteria stated in the RFP.

**Question 4:**

The Main RFP document states an estimated TCV of USD \$1.5 Billion for Category 1, \$500 Million for Category 2, and \$50 Million for Category 3. This of course includes US and Canada financials. The Canadian and US market have several key differences in structure as well as Proponents that contribute to taxpayer based Public Sector funding. Please provide details on the size and scope of the Canadian only business through Canoe Sourcewell and explain if the Scoring and Awards would be independent for each Country - Public Sector Marketplace.

**Answer 4:**

The RFP anticipated volume is an estimate based on past volumes of similar Sourcewell contracts. It is an estimate only, and no sales or sales volume are guaranteed. There is no separate estimate of Canadian volume or percentage estimates by geographic region.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/08/2023, is required at the time of proposal submittal.



11/9/2023

Addendum No. 6

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Table 15A includes questions 74 through 79; however, questions 77 and 78 appear to reference an older version with different numbering. Specifically, Q77 addresses 'software related to the purchase of the equipment described in Lines 72 -74 above' which should read Lines 74 – 76. Further Q78 addresses 'Configuration, software implementation, hardware installation, support, assessment, training, and asset lifecycle services related to the purchase of the equipment or software described in Lines 72 – 75 above' which should read lines 77.

Will Sourcewell release an updated Table 15A to reflect updated line numbers?

**Answer 1:**

Table 15A has been corrected and is available in the Sourcewell Procurement Portal.

**Question 2:**

Pricing (RFP Section III, A. Requirements, 1 – page 8) is directed as either Line-Item Pricing or Percentage Discount from Catalog Pricing, or a combination of these. Sourcewell goes on to define Percentage Discount from Catalog or Category as 'based on a percentage discount from a catalog or list price, defined as a published Manufacturer's Suggested Retail Price (MSRP) for the products or services.' Will Sourcewell include an additional definition of percentage discount from a catalog or list price defined as 'that price that is publicly available and verifiable such as a company web-based, nationally advertised price as defined on company's website for products or services?'

**Answer 2:**

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to articulate and propose the pricing approach that aligns with their business methods and satisfies the requirements of RFP Section III. – Pricing. Proposals are evaluated based on the criteria stated in the RFP.

**Question 3:**

Regarding Table 3: Industry Recognition & Marketplace Success, Line item #22, can you please clarify if bidders should provide an aggregate total of the sales volume or separate figures for each of the three years' annual sales volume?

**Answer 3:**

It is left to the discretion of each proposer to determine the information and documentation necessary to best demonstrate their Financial, Industry and Marketplace Success and satisfy all the requirements included in the questionnaire tables.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/9/2023, is required at the time of proposal submittal.



11/15/2023

Addendum No. 7

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

We are a provider of on-prem and SaaS solutions with accompanying services. We are trying to determine if our solutions would be eligible for this RFP. For Category 2, the RFP states that it includes but is not limited to: Cloud, such as...Software as a Service (SaaS), and strategy, design, migration, deployment, and managed cloud solutions. But later states that Category 2 should NOT include Software-as-a-Service (SaaS)-only solutions. How are you defining the difference between these two? Is the latter implying an offering without any accompanying services?

**Answer 1:**

The primary focus of Category 2 is on security, cloud, network, and data services. This category should NOT be construed to include: Software-as-a-Service (SaaS)-only solutions. Proposers that provide only those solutions will be deemed out of scope.

**Question 2:**

Will we have an enrollment form with the end user once the Purchase Order is received? The enrollment form will include terms and conditions that spells out billing with the end user, indemnification etc.

**Answer 2:**

Refer to Sourcewell contract template Section 6. B. – Additional Terms and Conditions/Participating Addendum. “Additional terms and conditions to a purchase order may be negotiated between a Participating Entity and Supplier, such as job or industry-specific requirements, legal requirements (e.g., affirmative action or immigration status requirements), or specific local policy requirements. ... Any

negotiated additional terms and conditions must never be less favorable to the Participating Entity than what is contained in this Contract.”

**Question 3:**

The contract that was included in the RFP, does it govern the relationship between Sourcewell and the vendor?

**Answer 3:**

Yes, refer to the template contract.

**Question 4:**

If we propose changes to the contract, can we provide an addendum or do we need to redline the Contract Template?

**Answer 4:**

Refer to Table 18: Exceptions to Terms, Conditions, or Specifications Form for directions on how to submit redline requested modifications to the contract.

**Question 5:**

Specifications, Table 3: Industry Recognition & Marketplace Success, Items 20 and 21: If a respondent can provide the total sales for the U.S. for the past three years as a Manufacturer since that information is available publicly, but is not able to provide the exact percentage of Government or Education sales, will the respondent be disqualified?

**Answer 5:**

It is left to the discretion of each proposer to determine the content and format of the data and documentation that best represents their proposal. Sourcewell will consider the relevant information submitted in each proposal and apply the evaluation criteria as set forth in the RFP.

**Question 6:**

Specifications, Table 3: Industry Recognition & Marketplace Success, Items 22 and 23: This section indicates that the annual sales volume for each contract needs to be disclosed. If a Manufacturer is not allowed to disclose the annual sales revenue for contracts without the express permission of the Lead State, GSA or Procurement official managing the contract for that State or Federal agency, can a manufacturer meet this requirement by providing Sourcewell the Procurement official's contact name and phone or email that is publicly available so Sourcewell can obtain this information?

**Answer 6:**

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine the information necessary to best demonstrate their past marketplace success and their ability to serve Sourcewell participating entities. Proposals are evaluated based on the criteria stated in the RFP.

**Question 7:**

Specifications, Table 5: Top Five Government or Education Customers: This section requests the top 5 customers for the respondent for government, education or non-profit. If a Manufacturer respondent instead provides the Top Five Government or Education customers willing to provide a reference will that meet this requirement since the Respondent cannot provide information on a specific customer without their express permission for a bid that will be disclosed publicly under the Open Records Act or Freedom of Information Act?

**Answer 7:**

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine the information necessary to best demonstrate their past marketplace success and their ability to serve Sourcewell participating entities. Proposers are not required to provide entity names when demonstrating their past marketplace.

**Question 8:**

Specifications, Table 6: Ability to Sell and Deliver Service, Item 35: Can Sourcewell please define 'U.S. Territories'?

**Answer 8:**

The US territories are American Samoa, Guam, the Northern Mariana Islands, Puerto Rico, and the U.S. Virgin Islands.

**Question 9:**

Specifications, Table 11: Pricing and Delivery, Item 59: If a respondent is providing guaranteed discounts by category, is a Price list by line item still required?

**Answer 9:**

It is left to the discretion of each proposer to articulate and propose the pricing approach that aligns with their business methods and satisfies the requirements of RFP Article III - Pricing. Proposals are evaluated based on the criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/15/2023, is required at the time of proposal submittal.



11/20/2023

Addendum No. 8

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Can Sourcewell confirm how a respondent would submit confidential information?

**Answer 1:**

RFP Section VI. E. - Disposition of Proposals, addresses the handling of materials submitted in response to the RFP under Minnesota Statutes Section 13.591.

**Question 2:**

There is no list of what is being procured. How do we know what to offer? who is procuring what product and quantity?

**Answer 2:**

Sourcewell utilizes a competitive, solutions-based solicitation approach that is not based on detailed specifications or finite quantities. A proposer can propose its entire line of equipment, products, and services falling within the requested equipment, products, and services as described in the RFP.

**Question 3:**

RFP\_121923\_Technology\_Products.pdf file, Section IV. Contract; Table 18: Exceptions to Terms, Conditions, or Specifications Form; and Addendum 7, Answer to Question 4: Section IV. Contract of the RFP file states, 'To request a modification to the template Contract, a proposer must submit the Exceptions to Terms, Conditions, or Specifications table with its proposal.' However, Table 18: Exceptions to Terms, Conditions, or Specifications Form states, 'a Proposer must submit the proposed exception(s) or requested modification(s) via redline in the Contract Template provided'.

Also, in Addendum 7, Answer to Question 4, it states, 'Refer to Table 18: Exceptions to Terms, Conditions, or Specifications Form for directions on how to submit redline requested modifications to the contract.'

To make it easier for Sourcewell to review, can Bidders only provide a redlined version of the Contract Template in lieu of providing a table with each exception listed?

**Answer 3:**

To identify any exception, or to request any modification, to Sourcewell standard Contract terms, conditions, or specifications, a Proposer must submit the proposed exception(s) or requested modification(s) via redline in the Contract Template provided in the "Bid Documents" section. Proposer must upload the redline in the "Requested Exceptions" upload field. All exceptions and/or proposed modifications are subject to review and approval by Sourcewell and will not automatically be included in the Contract. In Table 18, the proposer only needs to acknowledge whether they have proposed exceptions or modifications.

Question 4:

Addendum 7, Answer to Question 4: In Addendum 7, Answer to Question 4, it states, 'Refer to Table 18: Exceptions to Terms, Conditions, or Specifications Form for directions on how to submit redline requested modifications to the contract.'

Does that mean that no separate Exception Table is needed and that Table 18 instruction providing a redline to the Contract Template is all that is required?

**Answer 4:**

Refer to answer #3 above.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/20/2023, is required at the time of proposal submittal.



11/22/2023

Addendum No. 9

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Q17, Q92

Question 17 requests “licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.”  
and

Question 92 requests “list any certifications or testing results you or your partner(s) hold which show security posture in your proposed solutions, if applicable.”  
Is Sourcewell seeking company licenses and certifications, employee licenses and certifications or both?

**Answer 1:**

Refer to template contract Section 19. – Compliance. It is left to the discretion of each proposer to determine the documentation necessary to best demonstrate their ability to serve Sourcewell participating entities. In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. The solicitation is a competitive process and proposals are evaluated on the content submitted.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/22/2023, is required at the time of proposal submittal.



11/27/2023

Addendum No. 10

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

If our company is only submitting for category 3 how should we fill in Tables 14B, 15A, 15B, 16A, and 16B?

**Answer 1:**

Proposers only need to respond to the Categories where they are proposing solutions.

**Question 2:**

We would like the meeting instructions for RFP #121923 Technology Products and Services with Related Solutions.

**Answer 2:**

The pre-proposal conference login instructions are available in the Documents section of the Sourcewell Procurement Portal and will also be emailed 2 business days prior.

**Question 3:**

In Table 8 Question 44 of the response form, the prompt requests to describe any Woman or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications. If a company has certain MBE designations in the form of joint ventures, can they list those in this section without needing to submit the entire proposal as a joint venture?

**Answer 3:**

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine the content and format of the data that best represents their proposal and best demonstrates their ability to serve Sourcewell participating entities. The solicitation is a competitive process and proposals are evaluated on the content submitted.

**Question 4:**

How is MBE designation/participation evaluated as part of the proposal scoring?

**Answer 4:**

All proposals are evaluated based on the criteria stated in the RFP. Additional guidance can be found in the "Sourcewell Evaluator Scoring Guide" found on the "Bids Homepage" in the Resource Materials section of the Sourcewell Procurement Portal. MBE designation and participation is located in the Value-Added Attribute section of the Questionnaire tables.

**Question 5:**

In Table 8 Question 44 of the response form, the prompt requests companies describe hub partners that have been obtained. Please define -hub partner- in this context.

**Answer 5:**

"HUB" is an acronym for historically underutilized business.

**Question 6:**

Table 11 Question 59 requests detailed pricing data on all items companies want Sourcewell to consider. Please clarify - for a services company, what kind of pricing data would be acceptable to respond to this question? Ex: Would GSA rates be acceptable proof points?

**Answer 6:**

It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Article III - Pricing. Proposals are evaluated based on the criteria stated in the RFP.

**Question 7:**

Are services companies required to respond to Table 9A (manufacturer warranty program)?

**Answer 7:**

Refer to the general instructions found in the header to Table 1, in Step 1 of the RFP Questionnaire. "General Instructions (applies to all Tables) Sourcewell prefers a brief but thorough response to each question. Please do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; mark "NA" if the question does not apply to you (preferably with an explanation)."

**Question 8:**

Table 6 Question 27 asks for a company's dealer network or distribution methods. Please define -dealer network- as applicable to services companies.

**Answer 8:**

Refer to RFP Section II. B. – Requested Equipment, Products, or Services – "... If Proposer requires the use of dealers, resellers, or subcontractors to provide the products or services, the Proposal should address how the products or services will be provided to Participating Entities and describe the network of dealers, resellers, and/or subcontractors that will be available to serve Participating Entities under a resulting contract." It is left to the discretion of each proposer to determine the information or documentation necessary to best demonstrate their ability to serve Sourcewell Participating Entities and satisfy all the requirements of the RFP and the questionnaire tables. Proposals are evaluated based on the criteria stated in the RFP. For additional detail on the requirement for awarded suppliers with respect to distributor/dealer networks, refer to Sourcewell Contract Template Section 2. C. – Dealers, Distributors, and/or Resellers.

**Question 9:**

We are asking you to postpone the submission date to at least January 19, 2024.

**Answer 9:**

With the availability of the Sourcewell Procurement Portal allowing for 24/7 remote access, an extension is not anticipated.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/27/2023, is required at the time of proposal submittal.



11/28/2023

Addendum No. 11

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Would Sourcewell please advise on how proposers who are offering multiple services under one category should respond to the solicitation? For example, under Category 2, if a proposer is submitting cybersecurity services and cloud services, is it acceptable for that proposer to submit one proposal to provide both services?

**Answer 1:**

Refer to RFP Section II. G. – Additional Considerations. Proposers may only submit one response. All offered solutions should be incorporated into that one response.

**Question 2:**

How can we verify the exact number of characters that are allowed in the narrative fields in Step 1?

**Answer 2:**

The character limit for the data entry fields is 32,000 characters.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/28/2023, is required at the time of proposal submittal.



11/30/2023

Addendum No. 12

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

As we are currently working through the development of the Category 2 services solutions we will be submitting in our response, we are also wondering what the process would be for adding additional solutions in the future, presuming that we are indeed named as an authorized reseller per Sourcewell's initial review of our response. The thinking here is that it would be best for us to submit our "fully baked" solutions now, and then look to add others later, as those are more completely developed. Thanks for your guidance in this regard.

**Answer 1:**

Section 4, Product and Pricing Change Requests of the Contract Template is applicable once a supplier has a contract and needs to change pricing or add or subtract products from the initial proposed offering within the scope of the original RFP.

**Question 2:**

Could Sourcewell please clarify the way information that is a Trade Secret is supposed to be submitted? For example, would Sourcewell like us to put the word Trade Secret in the text box in the portal, and provide a document with that information redacted in the documents upload section?

**Answer 2:**

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. So, it is left to the discretion of each proposer to determine the information necessary to best demonstrate their ability to serve Sourcewell members and that they are willing to include. The solicitation is a competitive process and proposals are

evaluated on the content submitted. Sourcewell is subject to the Minnesota Government Data Practices Act and will not execute a non-disclosure agreement for a proposer. Reference Section VI. E. of the Sourcewell RFP.

**Question 3:**

In the ever changing landscape of cybersecurity, there are continuous updates to services that are provided for new threats. Is there a process Sourcewell follows for updating services offered to an awarded cooperative contract? If so, could Sourcewell provide the process?

**Answer 3:**

See Answer #1 above.

**Question 4:**

What is the approximate contract value of category 3? How did you calculate that value? Are there current members requesting specific lifecycle services (outside of those offered by vendor currently on the IT contract)? If so, can you describe the scope of opportunities those members have?

**Answer 4:**

Refer to RFP Section II. E. – Estimated Contract Value and Usage, “...the estimated annual value of Category 3 transactions from contracts resulting from this RFP are anticipated to be USD \$50 Million.” The RFP anticipated volume is an estimate based on past volumes of similar contracts. It is an estimate only, and no sales or sales volume are guaranteed.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 11/30/2023, is required at the time of proposal submittal.



12/01/2023

Addendum No. 13

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Table 9B - Can you further define specifically what services you are referring to in questions 53 and 54?

**Answer 1:**

Performance standards allow a proposer to describe any minimum or targeted performance standards applicable to their proposed solutions. Service standards allow a proposer to describe any service standards supporting their proposed solutions. Table 9B, Line items 53 and 54 provides examples of service standards or guarantees such as policies, metrics, or KPIs.

**Question 2:**

Can the state of Alabama utilize this contract?

**Answer 2:**

Refer to RFP Section I. A. Sourcewell – “Sourcewell is a State of Minnesota local government unit and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) that facilitates a competitive public solicitation and contract award process for the benefit of its 50,000+ participating entities across the United States and Canada.” Acceptance and use comes down to local policy and interpretation of the agency.

**Question 3:**

'At times Sourcewell also partners with other cooperatives'  
Please provide examples of other cooperatives you have partnered with or are currently in partnership with.

**Answer 3:**

As stated in RFP Section I. A., "At times, Sourcewell also partners with other purchasing cooperatives...expanding the reach of contracted vendors' potential pool of end users." However, regarding this RFP, Sourcewell has not partnered with another purchasing cooperative to co-solicit this opportunity. Each RFP is an independent opportunity of any other prior, current or future RFPs.

**Question 4:**

Are there other state governments, in addition to Minnesota and Hawaii who currently buy from this contract? Are there any states that have explicitly stated they will not purchase from this contract?

**Answer 4:**

Many state agencies utilize Sourcewell contracts. Acceptance and use comes down to local policy and interpretation of the agency.

**Question 5:**

Please clarify the administrative fee for this contract, for each category. Please elaborate on the flat fee. Our assumption is that all vendors awarded would be paying the same fees to Sourcewell, is that correct?

**Answer 5:**

Refer to Addendum 4, Answer 4.

**Question 6:**

Is the admin fee of 1-2% collected on only contracted deals sold in the 5-county service area of Minnesota (Cass, Crow Wing, Morrison, Todd and Wadena counties)?

**Answer 6:**

The administration fee applies to all sales that result from Sourcewell contracts regardless of location.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 12/01/2023, is required at the time of proposal submittal.



12/5/2023

Addendum No. 14

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Is a CAGE code required to submit a response?

**Answer 1:**

A CAGE or Unique Entity Identifier (SAM) code is not required to be considered for or awarded a Sourcewell contract. Proposals are evaluated based on the criteria as stated in the RFP. Refer to the General Instructions above Questionnaire Table 1. Respond "N/A" if a question does not apply (preferably with an explanation).

**Question 2:**

Addendum 13 shows that it has 13 pages count next to download tab. when I downloaded it shows only 3 pages. If it more than 3 pages please update the system.

**Answer 2:**

The Sourcewell Procurement Portal has been updated to reflect 3 pages for Addendum 13.

**Question 3:**

Page 5, section Category 2c states Software as a Service (SaaS) is included. Further in the section, verbiage states This category should NOT be construed to include: b. Software-as-a-Service (SaaS)-only solutions. Question: What are SaaS only solutions?

**Answer 3:**

Sourcewell defines SaaS-only solutions as software-only solutions which are hosted in the cloud. Sourcewell is seeking more comprehensive cloud solutions which may include cloud strategy, design, migration, deployment, managed cloud, PaaS, or IaaS solutions.

**Question 4:**

If I understand correctly, an e-commerce site is required if we bid on category 1. May I ask why is there an upload option in Documents for the pricing table? Are we supposed to upload the entire catalog?

**Answer 4:**

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Article III - Pricing. Proposals are evaluated based on the criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 12/5/2023, is required at the time of proposal submittal.



12/6/2023

Addendum No. 15

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Could Sourcewell confirm if vendors can submit hourly rates for Category 2 as no specific scope of work is mentioned to determine project pricing?

**Answer 1:**

It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Section III - Pricing. Proposals are evaluated based on the criteria stated in the RFP.

**Question 2:**

Can vendors provide remote and offshore candidates?

**Answer 2:**

It is left to the discretion of each proposer to determine the information and documentation necessary to best demonstrate their ability to serve Sourcewell participating entities and satisfy all the requirements included in the questionnaire tables. Proposals are evaluated based on the criteria stated in the RFP.

**Question 3:**

Are vendors allowed to work from offshore, considering a more competitive rate as compared to onshore?

**Answer 3:**

The Sourcewell RFP is an open and competitive solicitation process. Sourcewell does not restrict a proposer's ability to submit a proposal based on their physical location. It is

left to the discretion of each proposer to determine the information or documentation necessary to best demonstrate their ability to serve Sourcewell participating entities. Proposals are evaluated based on the criteria stated in the RFP.

**Question 4:**

Can firms provide job titles as pricing for the services they are bidding on?

**Answer 4:**

It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Section III - Pricing. Proposals are evaluated based on the criteria stated in the RFP.

**Question 5:**

Can firms provide commercial experience in Table 5?

**Answer 5:**

Refer to the instructions for Table 5 – Line Item 25: “Provide a list of your top five government, education, or non-profit customers (entity name is optional), including entity type, the state or province the entity is located in, scope of the project(s), size of transaction(s), and dollar volumes from the past three years.”

**Question 6:**

Can bidders use electronic signatures?

**Answer 6:**

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to articulate its capabilities in the manner that best aligns with their business methods.

**Question 7:**

Should firms provide a License to do Business for Sourcewell or the State of Minnesota alongside the response?

**Answer 7:**

Refer to Section 19 of the Sourcewell contract template regarding legal, regulatory, and licensure requirements. Proposers are solely responsible for acquiring any licenses to do business in the areas they propose to serve Sourcewell participating entities.

**Question 8:**

Do bidders have to provide a Good Standing Certificate with the response?

**Answer 8:**

Each proposer, in its discretion, will determine the documentation necessary to best demonstrate its ability to serve Sourcewell participating entities and fulfill the requirements set forth in the RFP. A Certificate of Good Standing is not a mandatory submittal requirement for submitting a proposal for this solicitation.

**Question 9:**

Is subcontracting required for bidding in this proposal? If so, what is the set-aside goal?

**Answer 9:**

Subcontracting is not a requirement for submitting a proposal. If a proposer intends to include subcontractors as part of its proposal refer to RFP Section II. B. – Requested Equipment, Products, or Services – “... If Proposer requires the use of dealers, resellers, or subcontractors to provide the products or services, the Proposal should address how the products or services will be provided to Participating Entities and describe the network of dealers, resellers, and/or subcontractors that will be available to serve Participating Entities under a resulting contract.” It is left to the discretion of each proposer to determine the information or documentation necessary to best demonstrate their ability to serve Sourcewell Participating Entities and satisfy all the requirements of the RFP and the questionnaire tables. Proposals are evaluated based on the criteria stated in the RFP.

**Question 10:**

What does Sourcewell expect from bidders to attach in the ‘Upload Additional Document’ section of the portal?

**Answer 10:**

Proposers may use the upload option in Step 2 of the proposal submission process to attach relevant supporting materials the proposer chooses to include with the proposal.

**Question 11:**

Is there a particular format regarding font, size, color, margins or structure for the attachments required from the bidders in Step 2-Documents?

**Answer 11:**

Refer to the instructions at the top of the page in Step 2 for additional guidance. PDF format is preferred, but Word, and Excel, or other compatible formats may be provided.

**Question 12:**

Should firms provide Certificates of Insurance with their response?

**Answer 12:**

Each proposer, in its discretion, will determine the documentation necessary to best demonstrate its ability to serve Sourcewell participating entities and fulfill the requirements set forth in the RFP. A Certificate of Insurance is not a mandatory submittal requirement for submitting a proposal for this solicitation.

**Question 13:**

Is there any SDVMBE/WBE/HUB participation goal for this bid?

**Answer 13:**

Sourcewell has not identified a specific socioeconomic goal for this solicitation. However, proposers may describe any socioeconomic certifications their company or hub partners have attained in Table 8, "Value-Added Attributes." Proposals are evaluated based on the criteria stated in the RFP.

**Question 14:**

Can firms utilize an Excel sheet to provide hourly rates for the service requested in Category 2?

**Answer 14:**

It is left to the discretion of each proposer to articulate and propose the pricing approach that aligns with their business methods and satisfies the requirements of RFP Section III. - Pricing. Proposers may use the upload fields in Step 2 of the proposal submission process to attach documents that the proposer chooses to include with the proposal. Proposals are evaluated based on the criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 12/6/2023, is required at the time of proposal submittal.



12/7/2023

Addendum No. 16

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Question and Answer to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Can the bidders make use of commercial references for table number 4?

**Answer 1:**

Refer to the instructions for Table 4 – Line Item 24: “Supply reference information from three customers who are eligible to be Sourcewell participating entities”.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 12/7/2023, is required at the time of proposal submittal.



12/12/2023

Addendum No. 17

Solicitation Number: RFP 121923

Solicitation Name: Technology Products and Services with Related Solutions

Consider the following Questions and Answers to be part of the above-titled solicitation documents. The remainder of the documents remain unchanged.

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**Question 1:**

Does Sourcewell have a preferred price list format that should be used for the proposal and, if awarded, subsequent price lists updates to the contract?

**Answer 1:**

It is left to the discretion of each proposer to determine and propose the pricing approach that aligns with their business methods and satisfies all the requirements of RFP Section III. – Pricing. Proposers may also review Section 4 of the Sourcewell Contract Template, “Product and Pricing Change Requests” for further clarification regarding post-award updates.

**Question 2:**

May additional services be added after contract award?

**Answer 2:**

Refer to Contract Template Section 4. “Product and Pricing Change Requests,” if awarded a contract a Supplier may request Equipment, Product, or Service changes, additions, or deletions at any time.

**Question 3:**

Section 2C of the Contract states: Supplier must provide to Sourcewell a current means to validate or authenticate Supplier’s authorized dealers, distributors, or resellers relative to the Equipment, Products, and Services offered under this Contract. Is there a prescribed process for this or can we simply provide a list and send updated versions if new resellers are added under this contract?

**Answer 3:**

Sourcewell does not require a specific process for updating Dealers, Distributors, and/or Resellers. Proposers are afforded the opportunity to describe their proposed means of updating their reseller network in Table 6, "Ability to Sell and Deliver Service" of the proposal response.

**Question 4:**

In line with Section 3 of the Contract, is our understanding correct that the pricing schedule would not include things like delivery, but that it will need to be included at the time of the quote?

**Answer 4:**

Refer to RFP Section III. A. - Pricing, "Proposers should clearly identify any costs that are NOT included in the proposed product or service pricing. This may include items such as installation, set up, mandatory training, or initial inspection. Include identification of any parties that impose such costs and their relationship to the proposer. Additionally, proposers should clearly describe any unique distribution and/or delivery methods or options offered in the proposal."

**Question 5:**

Section 6 of the contract states that order flow and procedure will be developed jointly between Sourcewell and Supplier. When and how does this occur?

**Answer 5:**

All awarded Suppliers are assigned a Supplier Development Administrator after the execution of the contract, any procedures developed will be done so after contract execution and with the assigned Supplier Development Administrator.

**Question 6:**

Is there a specific format for the annual business review?

**Answer 6:**

Upon award, that will be outlined during the contract launch with your Supplier Development Administrator.

**Question 7:**

Is there a specific format for the contract sales activity report, other than to include the fields identified in Section 8A of the Contract?

**Answer 7:**

All requirements pertaining to the Contract Sales Activity Report are specified in Section 8. A. of the contract template. Further information will be provided during the contract launch for awarded suppliers.

**Question 8:**

According to Section 8B of the Contract, payments must be received no later than 45 calendar days after the end of each calendar quarter. Does the 45 days from the quarter start at the quarter in which a quote is issued, delivery occurs, implementation occurs, final acceptance occurs, when the reseller is paid by the participating entity, or when the supplier is paid by its reseller?

**Answer 8:**

Refer to template contract Section 8 – Report on Contract Sales Activity and Administrative Fee Payment, for additional details on the required sales activity report, the required report fields, and the process for remittance of administrative fees. Most suppliers pay the agreed administrative fee once they receive payment for products, equipment or services rendered under contract.

**Question 9:**

Looking at Section 10A of the Contract, is our understanding correct that the extension to Participating Entities mean that they also have this examination right over transactions in which they were involved?

**Answer 9:**

Yes.

**Question 10:**

Referring to Section 18 of the Contract, given that we are a manufacturer/supplier, it seems unlikely that bodily or property damage would be necessary. If our insurance broker is in agreement, would it be possible to remove the requirements relating to worker's compensation and bodily/personal injury from the Commercial General Liability and perhaps just flow down this requirement, if necessary, to our resellers?

**Answer 10:**

A request for modification to the Sourcwell contract template may be submitted with a proposal. To request a modification to the template contract terms, conditions, or specifications, a proposer may complete and submit a contract template with tracked changes of the modifications they are requesting.

**Question 11:**

Regarding Section 21 of the Contract, is the express inclusion of all subsections herein an absolute requirement?

**Answer 11:**

A request for modification to the Sourcewell contract template may be submitted with the proposal. To request a modification to the template contract terms, conditions, or specifications, a proposer may complete and submit a contract template with tracked changes of the modifications they are requesting.

**Question 12:**

How would Sourcewell like for products to be referenced on the electronic catalogue?

**Answer 12:**

Refer to RFP Section II. B. 1 for details on the requested equipment, products, or services. Proposers responding to Category 1 must offer a complete electronic catalog system permitting Sourcewell and Sourcewell Participating Entities to make web-based purchases for solutions defined in Category 1. The catalog must be designed to populate with the Sourcewell and Sourcewell Participating Entities pricing offered by the proposer.

**Question 13:**

How do we customize products on the site?

**Answer 13:**

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine the content of its proposal. The Sourcewell Procurement Portal allows for respondents to provide narrative responses to each question and also allows a proposer to upload additional documents as a part of their response.

**Question 14:**

Most enterprise solutions require customization and cannot be built via a B2B, how should these customizations be reflected in the B2B portal?

**Answer 14:**

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine the content of its proposal. The Sourcewell Procurement Portal allows for respondents to provide

narrative responses to each question and also allows a proposer to upload additional documents as a part of their response.

**Question 15:**

What type of risk assessment is Sourcewell looking for?

**Answer 15:**

Refer to RFP Section II. B. 1 for details on the requested equipment, products, or services. Sourcewell is seeking equipment, products, or services that meet the general requirements of the scope of this RFP and that are commonly desired or are required by law or industry standards. Offerings and capabilities of the supplier's services, such as cyber risk assessment, must be proposed by the supplier.

**Question 16:**

For the estimated sales volume presented under E. Estimated Contract Value and Usage, Sourcewell, please break down these numbers by Government & education agencies in the US, Nonprofits in the US and Canadian organizations.

**Answer 16:**

The estimated value of all resultant contracts provided in Section II. E. of the RFP is based on past volumes of similar Sourcewell contracts. It is an estimate only, and no sales or sales volume are guaranteed. There is no separate estimate of Canadian volume or estimates by vertical.

**Question 17:**

Can you provide more clarity around Table 5, Size of Transaction(s)? Are you looking for details about the personnel/staffing size, level of effort or budget size, for example?

**Answer 17:**

In the competitive process, Sourcewell will not advise a proposer on the content of the proposal. It is left to the discretion of each proposer to determine the information necessary to best demonstrate their past marketplace success. Proposals are evaluated based on the criteria stated in the RFP.

**Question 18:**

How many awards will be issued under each Category: Category 1, Category 2, and Category 3?

**Answer 18:**

Refer to RFP Section VI. A. Evaluation for details regarding awards issued under this RFP. "It is the intent of Sourcewell to award one or more contracts to responsive and responsible proposers offering the best overall quality, selection of equipment, products, and services, and price that meet the commonly requested specifications of Sourcewell and its Participating Entities. The award(s) will be limited to the number of proposers that Sourcewell determines is necessary to meet the needs of its Participating Entities."

**Question 19:**

Will any category awards be reserved for SMALL, WBE, or MBE businesses?

**Answer 19:**

Sourcewell has not identified a specific socioeconomic goal for this solicitation. However, proposers may describe any socioeconomic certifications their company or hub partners have attained in Table 8, "Value-Added Attributes." Proposals are evaluated based on the criteria stated in the RFP.

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End of Addendum

Acknowledgement of this Addendum to RFP 121923 posted to the Sourcewell Procurement Portal on 12/12/2023, is required at the time of proposal submittal.

# OAK RIDGE SCHOOLS

## New Club Request Form

School: \_\_Robertsville Middle School\_\_

Club Name: \_\_Rams Cube Club\_\_ Sponsor: \_\_Ms. Abby Douglas\_\_

Club Membership: \_\_All Grades 5<sup>th</sup> – 8<sup>th</sup>\_\_

Selection of Officers: \_\_\_\_\_

### Club Purpose:

We want everybody to enjoy cubing as much as we do and to teach them how to solve a Rubik's Cube, including tips and tricks.

### Club Activities:

Learn to solve a Rubik's Cubes like 2x2, 3x3, and 4x4  
Improve solving time of a Rubik's Cube  
Learn different algorithms to solve

### Club Meeting Times:

Fridays 3:00 – 3:45

### Club Funding:

No funding needed

### Rules and Regulations:

Students who join the club should bring their own cube and bring extras for those who do not have a cube.  
Students will need to have a ride home after the club.

### Other Pertinent Information:

No experience necessary, all levels welcome.

Student Representative: \_\_Riley McKee and Archer Kuhns\_\_

RMS Administration Approval: \_\_Christy Free\_\_ Date: \_\_2/24/25\_\_

Date Student Council Approved: \_\_\_\_\_ Date BOE Approved: \_\_\_\_\_

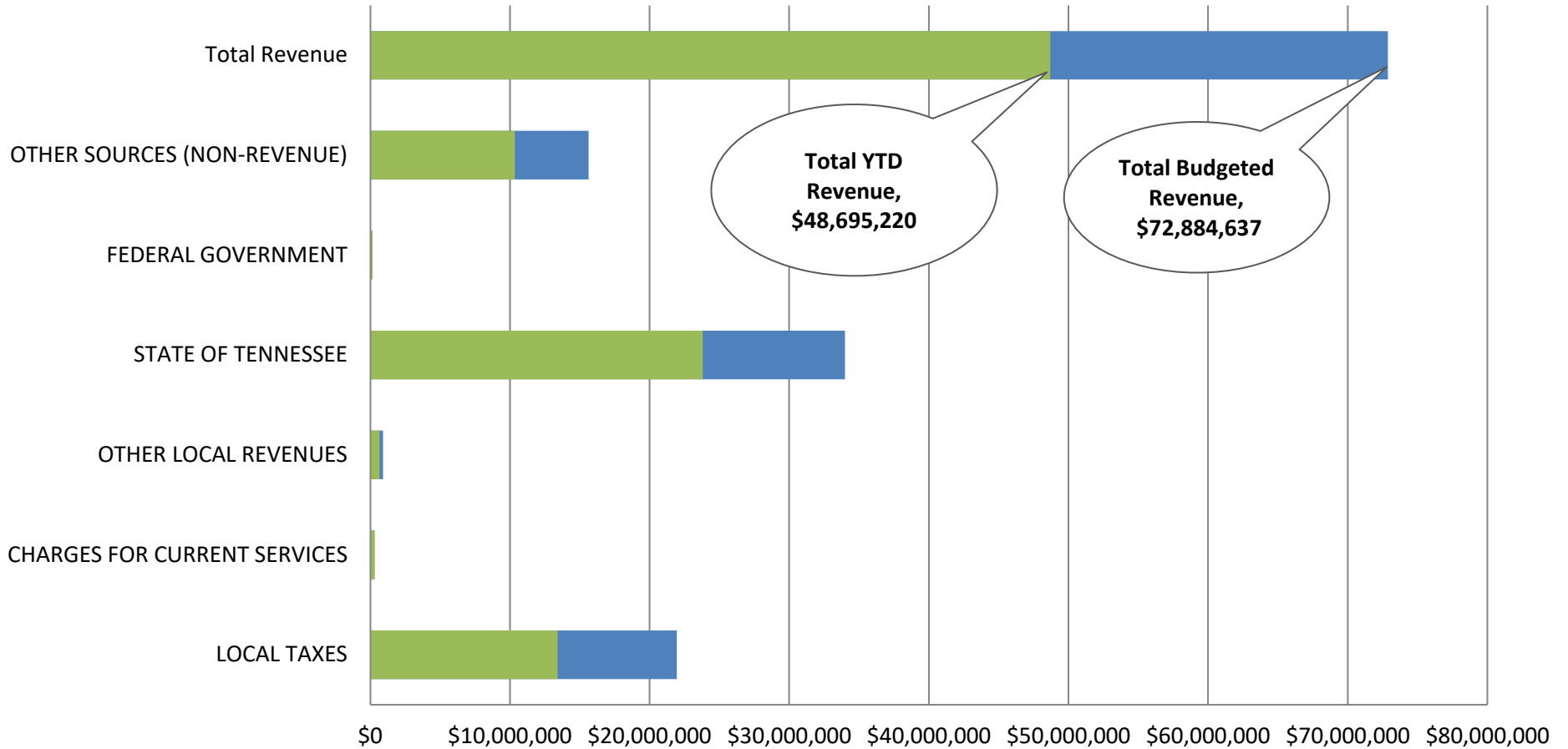
Acct	Acct	2024-25 FYTD Budget	February 2024-25 Monthly Activity	2024-25 Year-To-Date	2024-25 Percent of Budget	2024-25 Variance from Bud	Encumbered Amount	Unencumbered Budget Remaining
40110	Current Property Tax	13,189,000.00	1,254,980.34	7,599,753.04	57.62%	5,589,246.96		5,589,246.96
40210	Local Option Sales Tax	8,765,000.00	842,212.74	5,805,859.82	66.24%	2,959,140.18		2,959,140.18
40275	Mixed Drink Tax	350.00	43.49	468.93	133.98%	-118.93		-118.93
43511	Tuition - Regular Day Students	300,000.00	14,291.04	311,804.75	103.93%	-11,804.75		-11,804.75
43533	Transportation Fees	3,000.00	140.00	2,910.99	97.03%	89.01		89.01
44110	Interest Earned	600,000.00	80,058.54	601,601.50	100.27%	-1,601.50		-1,601.50
44120	Lease/Rentals	12,000.00	1,274.00	16,034.75	133.62%	-4,034.75		-4,034.75
44170	Miscellaneous Refunds	5,500.00		7,027.10	127.77%	-1,527.10		-1,527.10
44530	Sale of Equipment	25,000.00		9,483.18	37.93%	15,516.82		15,516.82
44570	Contributions & Gifts	223,992.94		9,049.94	4.04%	214,943.00		214,943.00
44990	Other Local Revenues	40,000.00		15,078.99	37.70%	24,921.01		24,921.01
46510	TN Investment in Student Achv	32,700,000.00	3,260,761.68	23,268,934.02	71.16%	9,431,065.98		9,431,065.98
46515	Early Childhood Education	554,980.71	42,991.31	251,935.44	45.40%	303,045.27		303,045.27
46596	Paid Parental Leave	100,000.00				100,000.00		100,000.00
46610	Career Ladder Program	76,000.00		42,144.68	55.45%	33,855.32		33,855.32
46790	Other Vocational	225,622.41	26,752.08	97,506.33	43.22%	128,116.08		128,116.08
46980	Other State Grants	338,476.94		96,526.71	28.52%	241,950.23		241,950.23
46990	Other State Revenues			55,720.59		-55,720.59		-55,720.59
47590	Other Federal Through State			91,316.97		-91,316.97		-91,316.97
47630	Public Law 874 - Maint/Operat.	20,000.00		33,388.00	166.94%	-13,388.00		-13,388.00
47640	ROTC Reimbursement	78,310.00		39,163.22	50.01%	39,146.78		39,146.78
49700	Insurance Recovery	8,441.00		5,941.00	70.38%	2,500.00		2,500.00
49800	Transfers In	125,000.00		4,261.53	3.41%	120,738.47		120,738.47
49810	City General Fund Transfer	15,493,963.00	1,291,163.58	10,329,308.64	66.67%	5,164,654.36		5,164,654.36
-----	Revenue	72,884,637.00	6,814,668.80	48,695,220.12	66.81%	24,189,416.88		24,189,416.88
=====								
71100	Regular Instruction Prgm	32,103,376.00	2,572,998.13	18,601,572.33	57.94%	13,501,803.67	11,917,291.26	1,584,512.41
71150	Alternative Instruction Prgm	937,527.00	80,334.58	550,840.32	58.75%	386,686.68	362,879.44	23,807.24
71200	Special Education Prgm	5,970,581.00	489,642.36	3,378,694.34	56.59%	2,591,886.66	2,265,771.28	326,115.38
71300	Career/Technical Education Prg	2,416,352.41	189,207.28	1,375,951.15	56.94%	1,040,401.26	803,107.46	237,293.80
71900	Contingency	751,115.97				751,115.97		751,115.97
72120	Health Services	832,180.00	66,099.61	511,788.77	61.50%	320,391.23	264,098.70	56,292.53
72130	Other Student Support	2,066,981.00	153,517.32	1,224,296.86	59.23%	842,684.14	694,116.11	148,568.03
72210	Regular Inst. Support	5,151,689.00	297,795.10	2,414,357.29	46.87%	2,737,331.71	1,889,985.92	847,345.79
72220	Special Education Support	976,906.00	68,486.28	501,710.53	51.36%	475,195.47	330,170.05	145,025.42
72230	Career & Technical Prg Support	280,705.77	18,650.68	150,256.65	53.53%	130,449.12	81,173.25	49,275.87
72250	Technology Services	3,004,493.90	201,478.07	1,969,953.73	65.57%	1,034,540.17	693,657.64	340,882.53
72260	Adult Programs	30,221.00	3,886.73	25,375.79	83.97%	4,845.21	15,691.09	-10,845.88

Acct	Acct	2024-25 FYTD Budget	February 2024-25 Monthly Activity	2024-25 Year-To-Date	2024-25 Percent of Budget	2024-25 Variance from Bud	2024-25 Encumbered Amount	Unencumbered Budget Remaining
72290	Communications	232,729.75	20,244.36	167,462.50	71.96%	65,267.25	75,257.40	-9,990.15
72310	Board of Education	1,308,649.00	51,750.36	1,003,273.47	76.66%	305,375.53	2,133.77	303,241.76
72320	Director of Schools	409,022.00	33,858.42	269,947.82	66.00%	139,074.18	130,370.90	8,703.28
72410	Office of the Principal	4,506,336.50	391,273.66	3,050,209.23	67.69%	1,456,127.27	1,542,637.58	-86,510.31
72510	Fiscal Services	1,078,828.00	90,305.89	680,780.45	63.10%	398,047.55	334,203.46	63,844.09
72520	Human Resources/ Personnel	511,168.00	36,664.81	351,339.38	68.73%	159,828.62	146,337.95	13,490.67
72610	Operation of Plant	5,227,155.28	379,412.23	3,122,006.18	59.73%	2,105,149.10	890,484.01	1,214,665.09
72620	Maintenance of Plant	2,270,830.66	127,797.67	1,418,036.70	62.45%	852,793.96	543,391.34	309,402.62
72710	Transportation	2,042,805.00	13,535.25	1,050,939.43	51.45%	991,865.57		991,865.57
73400	Early Childhood Education	453,803.12	49,177.57	260,345.43	57.37%	193,457.69	168,843.63	24,614.06
73401	Pre-K General Fund	921,939.00	64,170.65	571,966.08	62.04%	349,972.92	267,510.99	82,461.93
76100	Regular Capital Outlay	2,090,549.47	903,910.34	1,676,197.07	80.18%	414,352.40	1,499,295.76	-1,084,943.36
82130	Education Principal on Debt	6,877.00		6,877.00	100.00%			
82230	Education Interest on Debt	123.00		123.00	100.00%			
99100	Transfers Out	126,015.17				126,015.17		126,015.17
-----	Expense	75,708,960.00	6,304,197.35	44,334,301.50	58.56%	31,374,658.50	24,918,408.99	6,456,249.51
-----	General Purpose School Fund	-2,824,323.00	510,471.45	4,360,918.62	62.61%	-7,185,241.62	-24,918,408.99	17,733,167.37
	Grand Revenue Totals	72,884,637.00	6,814,668.80	48,695,220.12	66.81%	24,189,416.88		24,189,416.88
	Grand Expense Totals	75,708,960.00	6,304,197.35	44,334,301.50	58.56%	31,374,658.50	24,918,408.99	6,456,249.51
	Grand Totals	2,824,323.00	510,471.45	4,360,918.62	-154.41%	7,185,241.62	24,918,408.99	17,733,167.37
		Loss	Profit	Profit		Loss	Loss	Profit

Number of Accounts: 1340

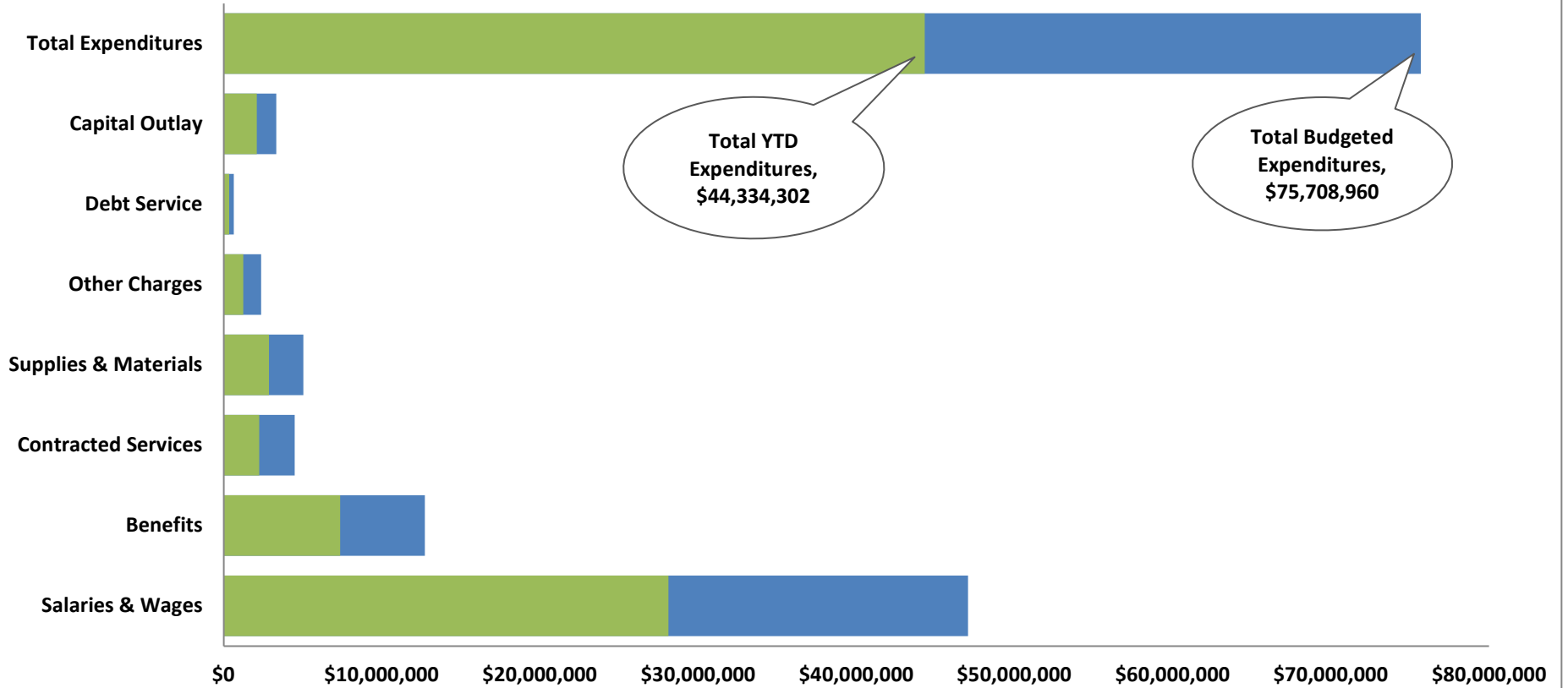
\*\*\*\*\* End of report \*\*\*\*\*

## General Fund Revenue Budget to Actual Summary - February, 2025



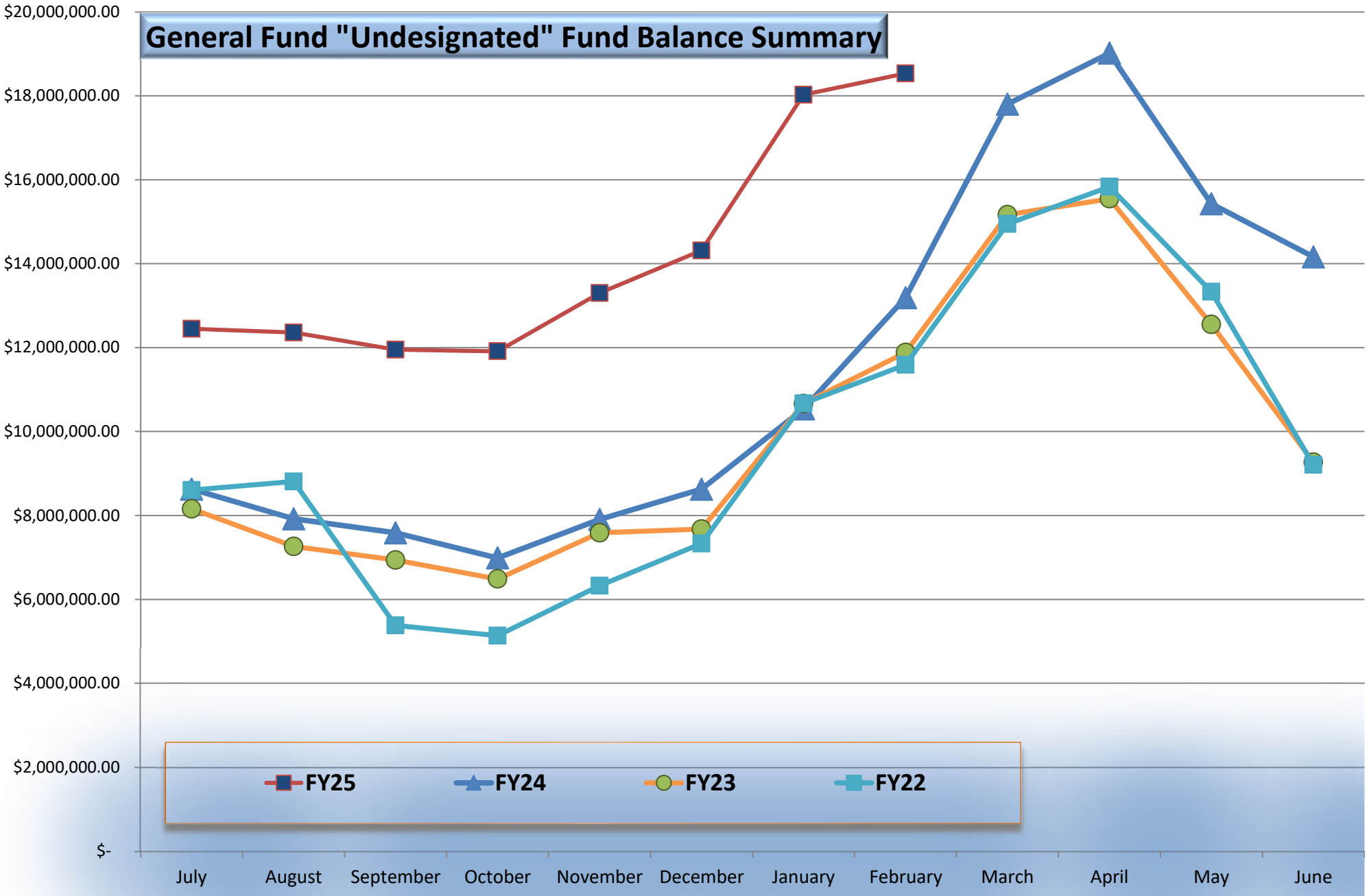
	LOCAL TAXES	CHARGES FOR CURRENT SERVICES	OTHER LOCAL REVENUES	STATE OF TENNESSEE	FEDERAL GOVERNMENT	OTHER SOURCES (NON-REVENUE)	Total Revenue
<b>Percent of Budget</b>	61.06%	103.87%	72.62%	70.05%	166.69%	66.16%	66.81%
<b>Year-To-Date</b>	13,406,081.79	314,715.74	658,275.46	23,812,767.77	163,868.19	10,339,511.17	\$48,695,220
<b>FYTD Budget</b>	21,954,350.00	303,000.00	906,492.94	33,995,080.06	98,310.00	15,627,404.00	\$72,884,637

## General Fund Expenditure Budget to Actual Summary by Object February, 2025



	Salaries & Wages	Benefits	Contracted Services	Supplies & Materials	Other Charges	Debt Service	Capital Outlay	Total Expenditures
<b>FYTD %</b>	59.76%	57.91%	50.12%	57.05%	52.31%	55.42%	62.79%	58.56%
<b>FYTD Activity</b>	28,130,921.50	7,376,223.68	2,250,287.86	2,878,880.47	1,245,184.31	357,000.00	2,095,803.68	\$44,334,302
<b>FYTD Revised Bdgt</b>	47,073,564.08	12,736,942.04	4,492,113.31	5,046,192.08	2,378,298.96	644,205.00	3,337,644.53	\$75,708,960

# General Fund "Undesignated" Fund Balance Summary



Legend: **FY25** (Red Square), **FY24** (Blue Triangle), **FY23** (Orange Circle), **FY22** (Teal Square)

Acct	Acct	2024-25 FYTD Budget	February 2024-25 Monthly Activity	2024-25 Year-To-Date	2024-25 Percent of Budget	2024-25 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
142	School Federal Projects							
R	Revenue							
47131	Vocational Program Improvement	132,897.49	3,338.72	102,679.84	77.26%	30,217.65		30,217.65
47141	Title I	938,811.79	75,697.18	453,163.43	48.27%	485,648.36		485,648.36
47143	Special Education Grants	1,449,817.71	107,786.67	617,471.19	42.59%	832,346.52		832,346.52
47145	Special Ed Pre-School Grants	63,013.67		11,766.02	18.67%	51,247.65		51,247.65
47146	English Lang Acq Grants	39,882.34	1,291.65	20,654.16	51.79%	19,228.18		19,228.18
47147	Title IV Part B, 21st Century	118,750.00	5,450.65	50,509.26	42.53%	68,240.74		68,240.74
47189	Title II	278,908.65	12,312.61	86,539.18	31.03%	192,369.47		192,369.47
47307	COVID-19 Grant B	3,250.00		2,750.00	84.62%	500.00		500.00
47309	COVID-19 Grant D	87,800.00	18,200.00	44,753.77	50.97%	43,046.23		43,046.23
47401	ESSER 3.0	168,353.98		168,353.98	100.00%			
47404	ARP Homeless Grant	36,243.11		5,559.50	15.34%	30,683.61		30,683.61
47590	Other Federal Through State	449,271.26	21,634.80	155,035.58	34.51%	294,235.68		294,235.68
47990	Other Direct Fedral Revenue	1,050,440.00	84,989.42	576,537.91	54.89%	473,902.09		473,902.09
-----	Revenue	4,817,440.00	330,701.70	2,295,773.82	47.66%	2,521,666.18		2,521,666.18
E	Expense							
71100	Regular Instruction Prgm	723,912.70	56,357.75	445,034.22	61.48%	278,878.48	248,650.75	30,227.73
71200	Special Education Prgm	1,135,098.85	89,801.35	571,367.41	50.34%	563,731.44	387,183.61	176,547.83
71300	Career/Technical Education Prg	107,263.00	3,835.65	96,552.12	90.01%	10,710.88	8,747.17	1,963.71
71900	Contingency	104,635.87				104,635.87		104,635.87
72120	Health Services	16,497.11		4,360.74	26.43%	12,136.37		12,136.37
72130	Other Student Support	329,324.16	24,622.96	235,449.57	71.49%	93,874.59	60,924.09	32,950.50
72210	Regular Inst. Support	659,135.12	26,202.85	309,084.51	46.89%	350,050.61	111,690.71	238,359.90
72220	Special Education Support	368,994.08	29,531.17	224,476.56	60.83%	144,517.52	125,708.54	18,808.98
72230	Career & Technical Prg Support	2,500.00	391.75	1,348.65	53.95%	1,151.35	105.18	1,046.17
72250	Technology Services	27,139.99		24,472.04	90.17%	2,667.95		2,667.95
72710	Transportation	11,466.00	890.06	6,270.14	54.68%	5,195.86		5,195.86
73100	Food Service	2,000.00				2,000.00	2,000.00	
73300	Community Services	1,162,125.00	97,928.40	727,298.72	62.58%	434,826.28	334,259.19	100,567.09
99100	Transfers Out	167,348.12		4,261.53	2.55%	163,086.59		163,086.59
-----	Expense	4,817,440.00	329,561.94	2,649,976.21	55.01%	2,167,463.79	1,279,269.24	888,194.55



Acct	Acct	2024-25 FYTD Budget	February 2024-25 Monthly Activity	2024-25 Year-To-Date	2024-25 Percent of Budget	2024-25 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
145	Other Education Funds							
R	Revenue							
44990	Other Local Revenues	35,000.00	200.00	21,753.60	62.15%	13,246.40		13,246.40
49800	Transfers In	124,434.00				124,434.00		124,434.00
-----	Revenue	159,434.00	200.00	21,753.60	13.64%	137,680.40		137,680.40
E	Expense							
73300	Community Services	159,434.00	10,922.85	96,896.18	60.78%	62,537.82		62,537.82
-----	Expense	159,434.00	10,922.85	96,896.18	60.78%	62,537.82		62,537.82
-----	Other Education Funds		-10,722.85	-75,142.58	37.21%	75,142.58		75,142.58
=====								
146	Extended School Program							
R	Revenue							
43581	Community Services Fees Child	497,695.00	47,844.50	368,004.35	73.94%	129,690.65		129,690.65
-----	Revenue	497,695.00	47,844.50	368,004.35	73.94%	129,690.65		129,690.65
E	Expense							
73300	Community Services	495,592.00	40,569.35	291,614.68	58.84%	203,977.32	114,830.30	89,147.02
99100	Transfers Out	10,000.00				10,000.00		10,000.00
-----	Expense	505,592.00	40,569.35	291,614.68	57.68%	213,977.32	114,830.30	99,147.02
-----	Extended School Program	-7,897.00	7,275.15	76,389.67	65.75%	-84,286.67	-114,830.30	30,543.63
=====								

<u>Acct</u>	<u>Acct</u>	<u>2024-25</u> <u>FYTD Budget</u>	<u>February 2024-25</u> <u>Monthly Activity</u>	<u>2024-25</u> <u>Year-To-Date</u>	<u>2024-25</u> <u>Percent of Budget</u>	<u>2024-25</u> <u>Variance from Bud</u>	<u>Encumbered</u> <u>Amount</u>	<u>Unencumbered</u> <u>Balance Remaining</u>
	Grand Revenue Totals	8,018,841.00	457,975.67	4,233,636.69	52.80%	3,785,204.31		3,785,204.31
	Grand Expense Totals	8,808,756.45	388,516.81	4,412,091.86	50.09%	4,396,664.59	1,497,319.88	2,899,344.71
	Grand Totals	789,915.45	69,458.86	178,455.17	22.59%	611,460.28	1,497,319.88	885,859.60
		Loss	Profit	Loss		Loss	Loss	Profit

Number of Accounts: 394

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

## Combined Fund Balance and YTD Operating Statement Summary

**February, 2025**

Description	General Fund 141	Federal Fund 142	Food Service Fund 143	Special Fund 145	ECC Fund 146
<b>Beginning Fund Balance July 1, 2024</b>	20,036,067.15	0.00	1,695,609.24	27,731.99	323,595.26
Plus YTD Revenue per books 2/28/25	48,695,220.12	2,295,773.82	1,548,104.92	21,753.60	368,004.35
Less YTD Expenditures per books 2/28/25	(44,334,301.50)	(2,649,976.21)	(1,373,604.79)	(96,896.18)	(291,614.68)
<b>Revenues Over (Under) Expenditures as of 2/28/25</b>	<b>4,360,918.62</b>	<b>(354,202.39)</b>	<b>174,500.13</b>	<b>(75,142.58)</b>	<b>76,389.67</b>
<b>Ending Fund Balance per books as of 2/28/25</b>	<b>24,396,985.77</b>	<b>(354,202.39)</b>	<b>1,870,109.37</b>	<b>(47,410.59)</b>	<b>399,984.93</b>

### Fund Balance Restricted/Committed/Assigned Status

Encumbrances and Deferred Revenue	\$ -		\$ 48,594.73		
Inventory					
Restricted for Career Ladder Program	277.57				
Restricted for Operation of Non-Instructional Services (CCI)	16,200.00		1,071,514.64		399,984.93
Committed for Other Purposes (Vehicles- ERR Fund)	0.00				
Committed for Other Purposes (Device Replacement)	3,000,000.00				
Assigned for Instruction- Coordinated School Health	3,035.59				
Assigned for other local grants					
Assigned for Instruction - Education Foundation Grant	10,629.84				
Assigned for Instruction (APSI-ORHS)	7,207.22				
Assigned for Support Services FRC Local Funds (56)				-47,410.59	
Nonspendable-Prepaid Expenditures					
<b>Assigned to Balance FY25 Budget</b>	<b>2,824,323.00</b>	<b>0.00</b>	<b>750,000.00</b>		
<b>Unassigned Fund Balance 2/28/25</b>	<b>\$ 18,535,312.55</b>	<b>-354,202.39</b>	<b>0.00</b>	<b>0.00</b>	
<b>Total Fund Balance 2/28/25</b>	<b>\$ 24,396,985.77</b>	<b>\$ (354,202.39)</b>	<b>\$ 1,870,109.37</b>	<b>(\$47,410.59)</b>	<b>\$ 399,984.93</b>

**Oak Ridge Schools**

**6th Attendance Period**

**March 1, 2025**

These numbers reflect the **2024-2025** Skyward Student Management System (Entity) active student enrollment count as of **March 1, 2025**.

The total includes **37** private school and home-schooled students receiving Special Ed services.



# Oak Ridge Schools

## Enrollment Entity Counts 6th RP 2024-25

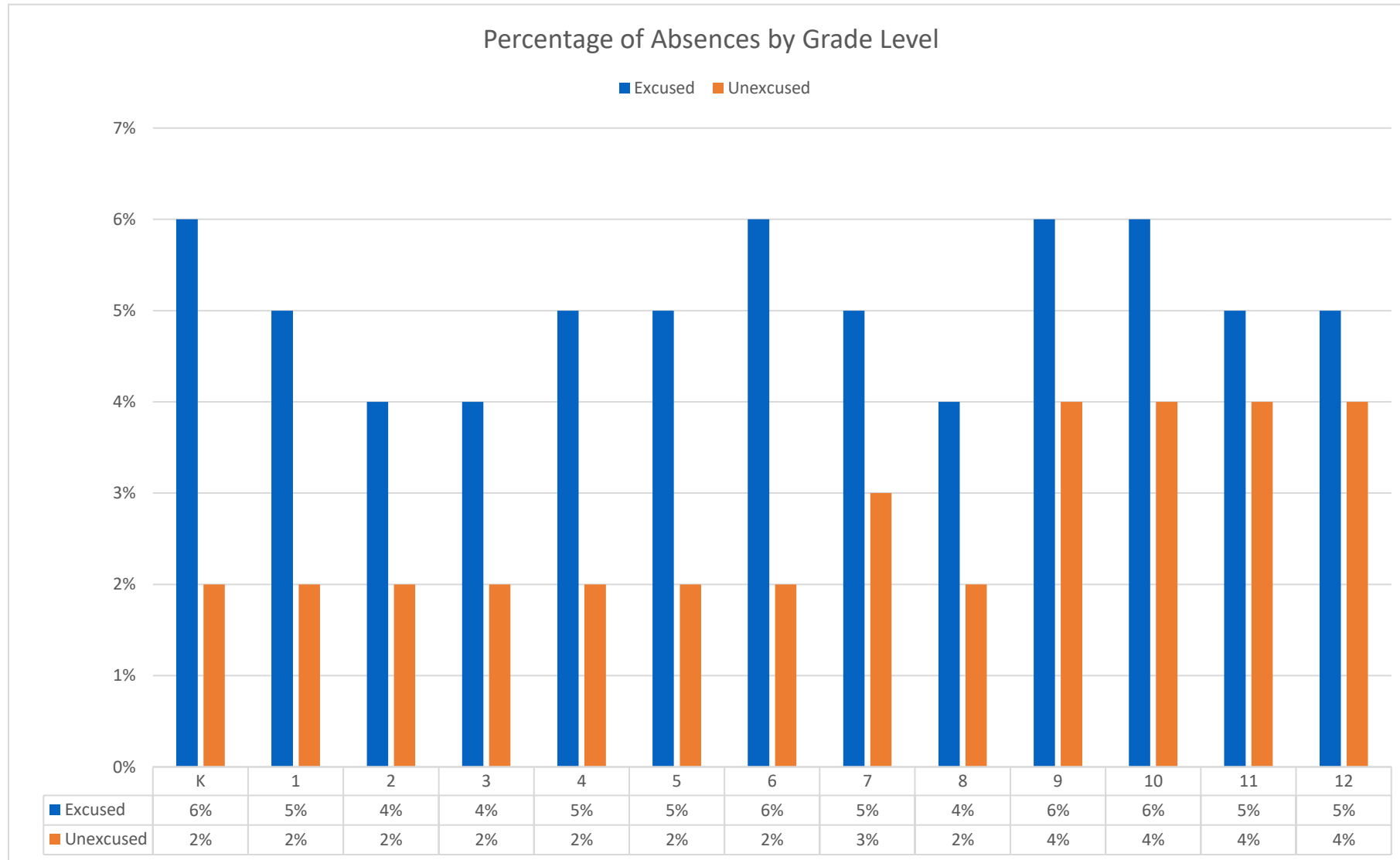
March 1, 2025

School	P3	P4	K	1	2	3	4	5	6	7	8	9	10	11	12	Total PK-12 2024-25	Previous 5th RP 2024-25	Diff	Total PK-12 2023-24
Preschool	112	131														243	242	1	247
Glenwood			80	61	83	79	67									370	369	1	367
Linden			99	107	102	104	109									521	516	5	521
Willow Brook			75	98	81	82	88									424	426	-2	421
Woodland			76	73	79	100	97									425	425	0	460
JMS								186	170	190	168					714	714	0	727
RMS								196	203	178	186					763	766	-3	746
ORHS												437	414	399	359	1609	1618	-9	1568
<b>Enrollment 2024-25</b>	<b>112</b>	<b>131</b>	<b>330</b>	<b>339</b>	<b>345</b>	<b>365</b>	<b>361</b>	<b>382</b>	<b>373</b>	<b>368</b>	<b>354</b>	<b>437</b>	<b>414</b>	<b>399</b>	<b>359</b>	<b>5069</b>	<b>5076</b>	<b>-7</b>	<b>5057</b>
Prev. 5th RP 2024-25	111	131	328	337	344	365	362	382	376	367	355	438	416	403	361	5076			
Difference	1	0	2	2	1	0	-1	0	-3	1	-1	-1	-2	-4	-2	-7			

This report compares the 2024-25 6th RP period enrollment with the 2024-25 5th RP period.

# Attendance Graphs

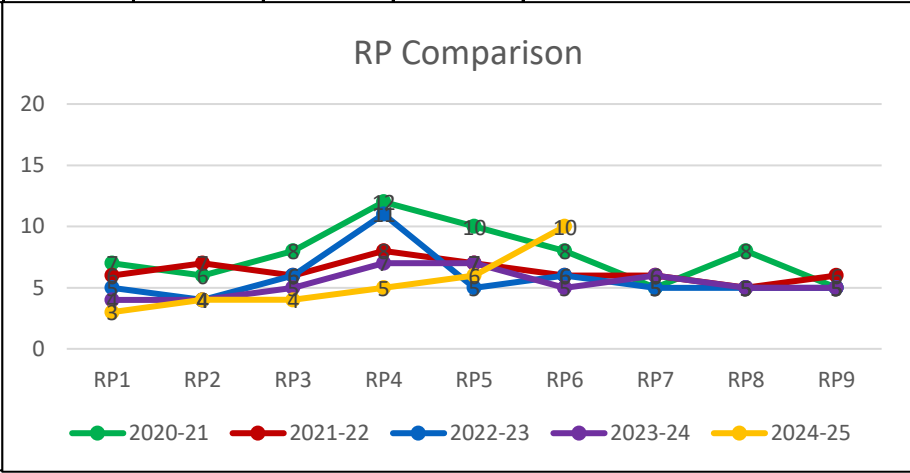
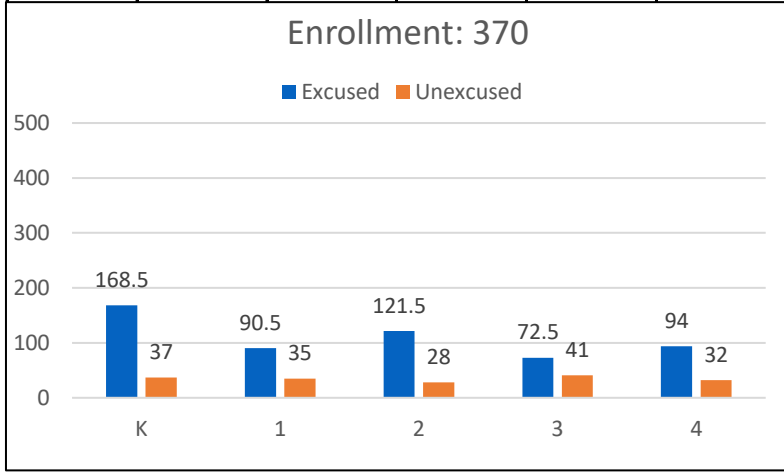
The graphs below display excused and unexcused absence totals, entity counts, and attendance percentages by grade and reporting period. The data was compiled using information from attendance detail and summary reports and entity counts reports.  
Reporting Period 6: 1/22/2025-2/21/2025



\* Percentages have been rounded to the nearest whole number.

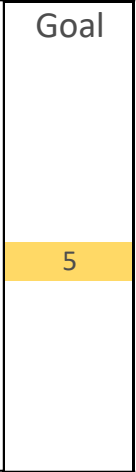
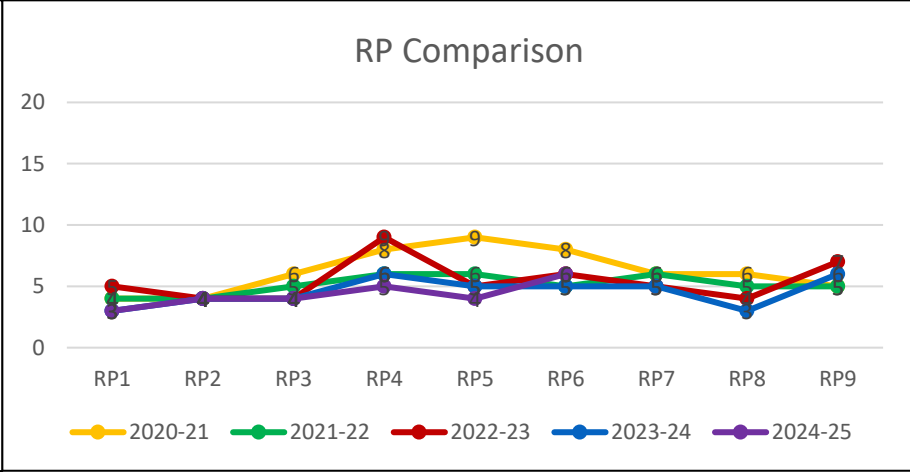
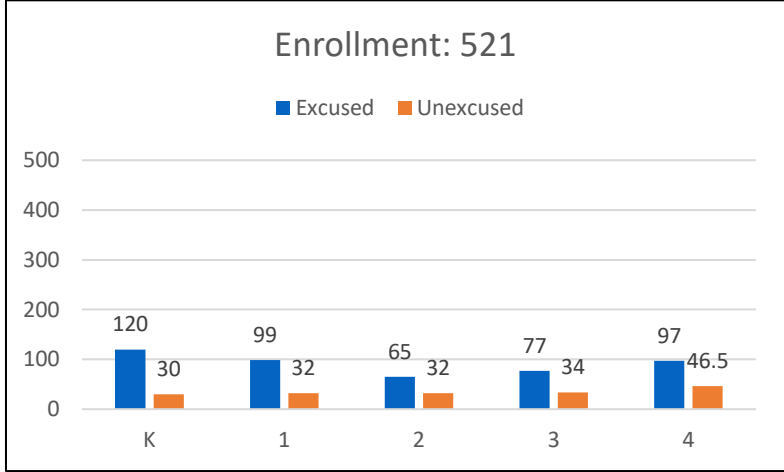
2020-21	RP1: 7.3%	RP2: 5.8%	RP3: 8.1%	RP4: 11.6%	RP5: 9.9%	RP6: 7.5%	RP7: 5.3%	RP8: 8%	RP9: 5.4%
2021-22	RP1: 6.3%	RP2: 6.7%	RP3: 6.3%	RP4: 7.7%	RP5: 6.9%	RP6: 5.8%	RP7: 6.3%	RP8: 8%	RP9: 5.9%
2022-23	RP1: 4.9%	RP2: 4.4%	RP3: 5.5%	RP4: 11%	RP5: 4.7%	RP6: 6.1%	RP7: 4.8%	RP8: 4.9%	RP9: 4.9%
2023-24	RP1: 4.3%	RP2: 4.2%	RP3: 5%	RP4: 7%	RP5: 6.9%	RP6: 5.1%	RP7: 6.2%	RP8: 4.7%	RP9: 4.5%
2024-25	RP1: 3.3%	RP2: 4.3%	RP3: 4%	RP4: 5%	RP5: 5.9%	RP6: 9.6%			

# Glenwood



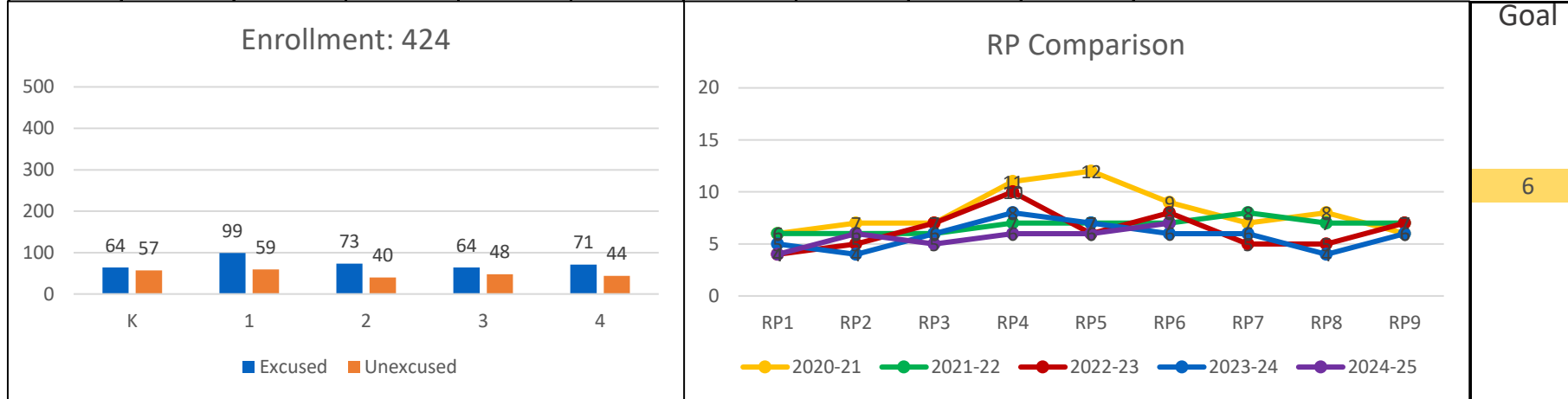
2020-21	RP1: 4.3%	RP2: 4.3%	RP3: 6.1%	RP4: 7.7%	RP5: 9.1%	RP6: 7.9%	RP7: 6.2%	RP8: 5.6%	RP9: 5.3%
2021-22	RP1: 4.4%	RP2: 4.2%	RP3: 4.8%	RP4: 6.4%	RP5: 5.8%	RP6: 4.6%	RP7: 5.5%	RP8: 5.4%	RP9: 5%
2022-23	RP1: 3.2%	RP2: 4%	RP3: 4.4%	RP4: 8.9%	RP5: 5.4%	RP6: 5.8%	RP7: 4.5%	RP8: 4.1%	RP9: 7.1%
2023-24	RP1: 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%
2024-25	RP1: 3.0%	RP2: 3.6%	RP3: 4.2%	RP4: 5.1%	RP5: 4.4%	RP6: 6.1%			

# Linden



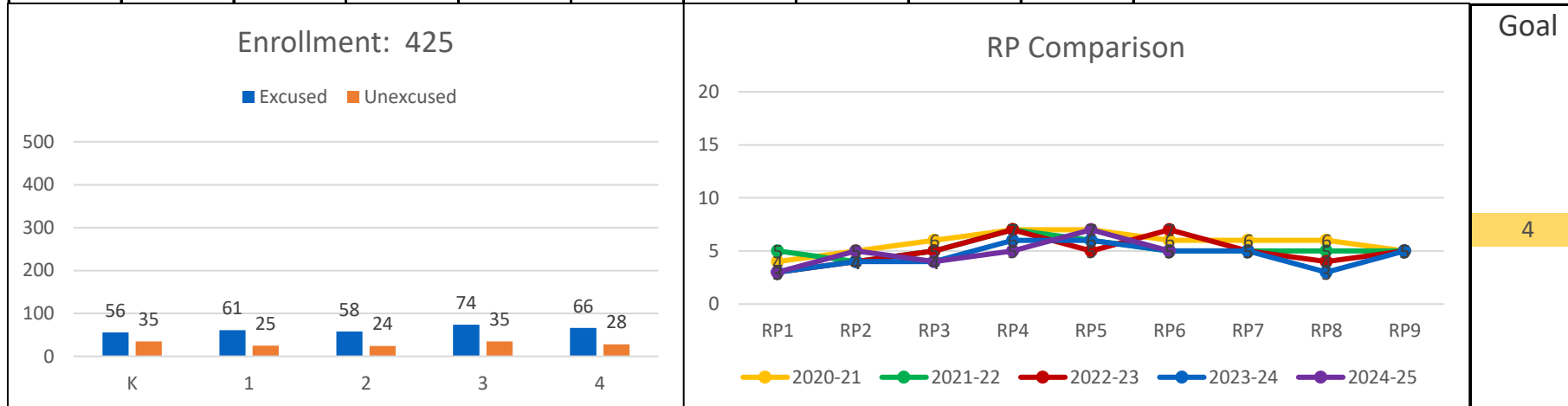
2020-21	RP1: 6.1%	RP2: 7.1%	RP3: 7.3%	RP4: 11%	RP5: 11.7%	RP6: 8.9%	RP7: 6.9%	RP8: 7.5%	RP9: 6.4%
2021-22	RP1: 6.1%	RP2: 6%	RP3: 6.4%	RP4: 6.9%	RP5: 6.6%	RP6: 6.5%	RP7: 8%	RP8: 6.6%	RP9: 7.4%
2022-23	RP1: 3.6%	RP2: 4.7%	RP3: 7%	RP4: 10%	RP5: 6.4%	RP6: 8.1%	RP7: 5.3%	RP8: 5.3%	RP9: 6.9%
2023-24	RP1: 4.9%	RP2: 4.4%	RP3: 5.5%	RP4: 7.7%	RP5: 7%	RP6: 5.9%	RP7: 6.2%	RP8: 4.3%	RP9: 6.3%
2024-25	RP1: 4.4%	RP2: 5.9%	RP3: 4.9%	RP4: 6.4%	RP5: 6.1%	RP6: 7.3%			

# Willow Brook



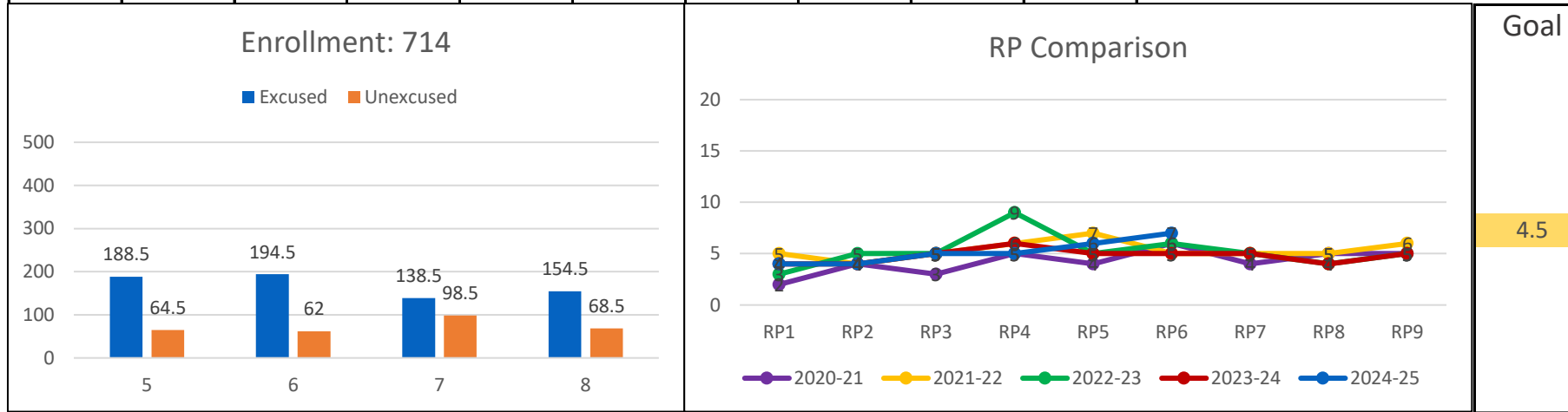
2020-21	RP1: 4.1%	RP2: 4.9%	RP3: 6.2%	RP4: 7.1%	RP5: 7.1%	RP6: 5.9%	RP7: 5.5%	RP8: 5.9%	RP9: 5.3%
2021-22	RP1: 4.5%	RP2: 4.1%	RP3: 4.8%	RP4: 6.7%	RP5: 5.9%	RP6: 5%	RP7: 4.7%	RP8: 4.5%	RP9: 5.2%
2022-23	RP1: 2.6%	RP2: 3.7%	RP3: 5.2%	RP4: 6.6%	RP5: 4.5%	RP6: 6.7%	RP7: 5.4%	RP8: 3.7%	RP9: 4.9%
2023-24	RP1: 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%
2024-25	RP1: 3.1%	RP2: 4.6%	RP3: 3.9%	RP4: 4.5%	RP5: 7.2%	RP6: 5.4%			

# Woodland



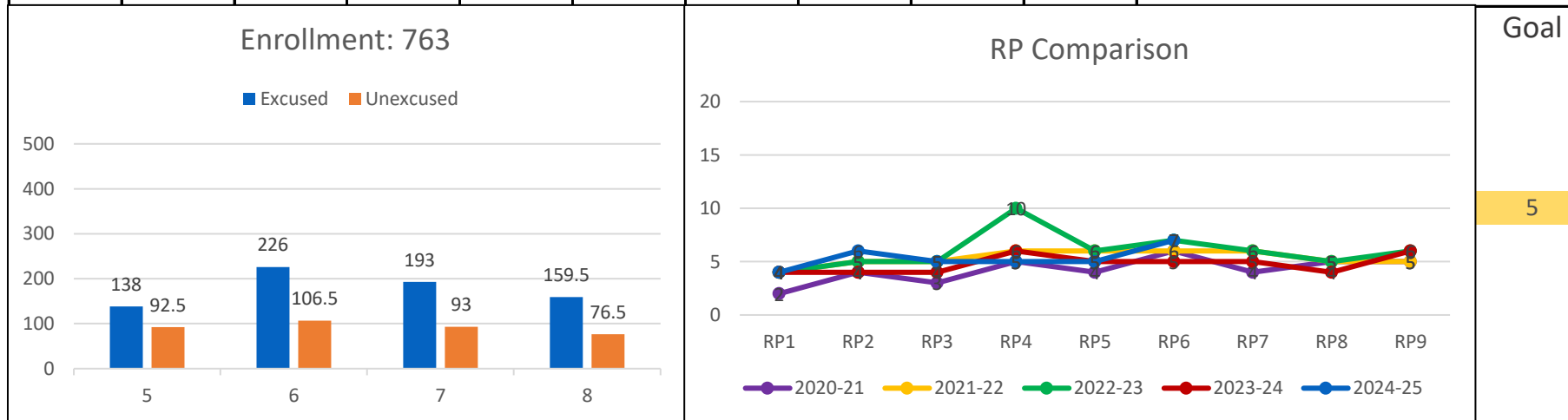
2020-21	RP1: 2.2%	RP2: 4.1%	RP3: 3.4%	RP4: 4.5%	RP5: 3.8%	RP6: 5.7%	RP7: 3.7%	RP8: 5.1%	RP9: 4.7%
2021-22	RP1: 5.1%	RP2: 4.2%	RP3: 4.9%	RP4: 5.9%	RP5: 6.8%	RP6: 5.4%	RP7: 5.3%	RP8: 4.9%	RP9: 6.1%
2022-23	RP1: 3.1%	RP2: 4.6%	RP3: 5%	RP4: 8.7%	RP5: 4.7%	RP6: 5.5%	RP7: 5.1%	RP8: 4.3%	RP9: 5.3%
2023-24	RP1: 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%
2024-25	RP1: 3.6%	RP2: 4.2%	RP3: 4.8%	RP4: 5%	RP5: 5.5%	RP6: 6.8%			

# Jefferson



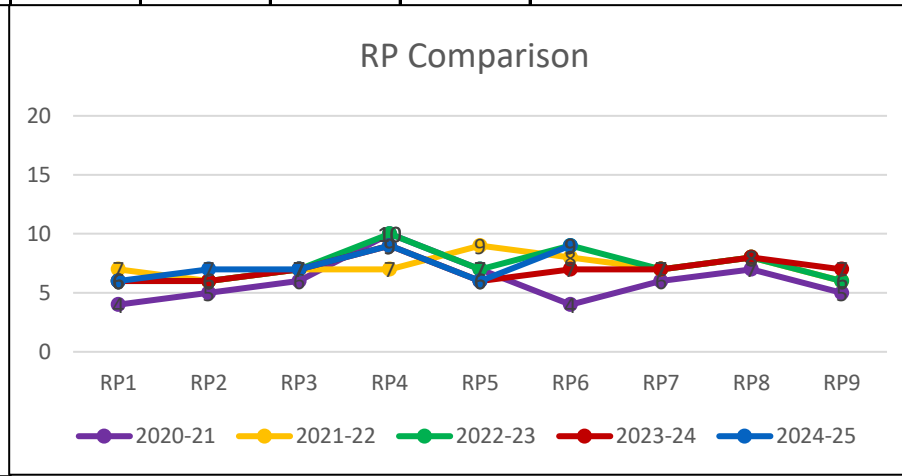
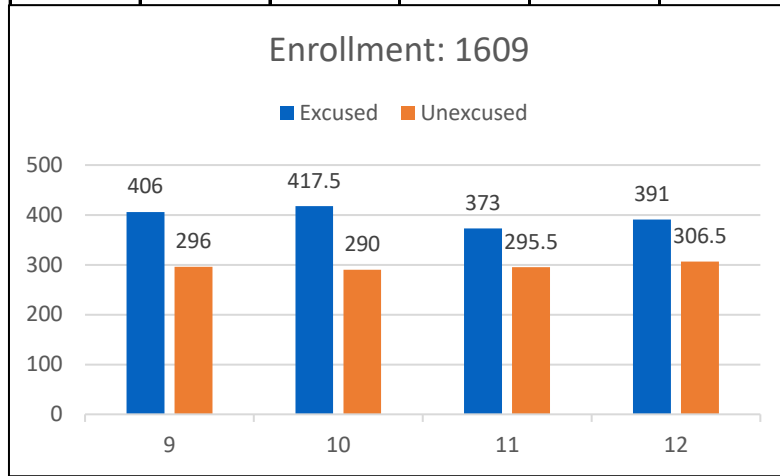
2020-21	RP1: 2%	RP2: 2.3%	RP3: 3.4%	RP4: 4%	RP5: 2.7%	RP6: 3.3%	RP7: 2.8%	RP8: 5.6%	RP9: 5.1%
2021-22	RP1: 4.2%	RP2: 4.7%	RP3: 5.4%	RP4: 5.8%	RP5: 5.9%	RP6: 5.5%	RP7: 5.6%	RP8: 5%	RP9: 5.3%
2022-23	RP1: 4.4%	RP2: 4.5%	RP3: 5.4%	RP4: 9.7%	RP5: 6.1%	RP6: 6.8%	RP7: 5.5%	RP8: 4.8%	RP9: 5.8%
2023-24	RP1: 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%
2024-25	RP1: 3.9%	RP2: 5.5%	RP3: 4.8%	RP4: 5.4%	RP5: 5.2%	RP6: 7.1%			

# Robertsville



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%
2024-25	RP1: 6.2%	RP2: 7.1%	RP3: 7.2%	RP4: 8.8%	RP5: 6.4%	RP6: 8.6%			

# ORHS



Goal
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