

# Regular Board of Education Meeting

March 30, 2026 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 02-23-26

B. ORHS Volleyball Field Trip to Murfreesboro, TN

C. ORHS FCCLA Field Trip to Washington, D.C.

D. ORHS Secret City Wildbots Field Trip to Houston, TX

## VIII. Items for Action

A. FY26 Budget Transfer #2 - Second Reading

B. FY26 General Audit Contract

C. FY26 TN ALL Corps Tutoring Innovation Grant and Early Literacy Tutoring Grant

D. FY26 Comprehensive Literacy State Development (CLSD) Grant

E. Preschool State Micro Grant

F. FY27 Non-Resident Tuition Rates

G. FY27 ORHS Oak Log Contract

H. Board Policy 1.803 Tobacco-Free Schools - First and Second Reading

I. Board Policy 3.500 Food Service Management - First and Second Reading

J. Board Policy 6.411 Student Wellness - First and Second Reading

K. Future Workforce Resolution

L. Purchase of Replacement Maintenance Vehicle

M. Purchase of Nutanix Software

N. Elevator Modernization and Hydraulic Jack Replacement at JMS

O. ORHS New Club Velocity XL

P. ORHS New Club National Technical Honors Society

Q. RMS New Club Taylor Swift Club

R. Selection of Oak Ridge Schools Volunteer of the Year

## IX. Items for Information

A. Legislative Update

B. Financial Report - February 2026

C. Enrollment & Attendance

## X. Items for Discussion

## XI. Old Business

## XII. New Business

## XIII. Communications

## XIV. Adjournment



## **Oak Ridge Preschool**

Oak Ridge Preschool hosted its annual Fathers and Friends Night in February and STEM Night in March. Both events were well attended by preschool families. Special thanks to our community partners, Grow Oak Ridge and Isotek, for their continued support. These experiences would not be possible without them. Following STEM Night, families completed a feedback survey. Thirty families responded, with 29 out of 30 rating the event a 10 out of 10.

## **Glenwood**

Glenwood celebrated the arts on Thursday, March 12. Student artwork was displayed throughout the school for families to enjoy, and kindergarten students performed for attendees. It was a wonderful evening celebrating creativity and the arts.

Glenwood was also honored with a free Little Library from Scholastic and award-winning author Dav Pilkey. The library will be filled with *Dog Man* books and more. A special thank you to Amy Kennedy for continually seeking innovative opportunities for Glenwood families.

## **Woodland**

On Monday, March 9, Mrs. Kidwell's kindergarten class at Woodland Elementary participated in a special nuclear energy field trip after the class was featured in *Knox News*. Students visited Analysis and Measurement Services Corporation for hands-on nuclear energy simulations and toured the Nuclear Technology labs at Roane State Community College in Oak Ridge. While there, they explored radiation detection equipment and met two robotic dogs used to detect radiation levels.

## **Willow Brook**

Students celebrated Read Across America Week by participating in a schoolwide reading challenge and enjoying Spirit Week activities. The week concluded with Mr. Nussbaum dressed as the Cat in the Hat to celebrate the school's accomplishments and Dr. Seuss' birthday.

On March 5, kindergarten, 1st-grade, and 4th-grade students attended field trips. Kindergarten and 1st grade visited the Oak Ridge Playhouse to see *The Emperor's New Clothes*, while 4th grade attended the ORHJS production of *Tuck Everlasting*.



## **Jefferson**

The JMS 7th and 8th grade bands earned Superior Ratings from every judge at the ETSSBOA Concert Performance Assessment held at Farragut High School.

The JMS Chess Team also placed 2nd out of seven teams this weekend and has qualified for the State Championship Tournament at Tennessee Tech University on March 21.

## **Robertsville**

In celebration of "Music in Our Schools" Month, the RMS 5th and 6th Grade Choirs performed a concert on Thursday, March 5, alongside the Oak Ridge Chorus Adult Choir. It was a wonderful celebration of lifelong singing and a meaningful experience for both our students and the Oak Ridge singing community. The concert's theme was friendship, featuring songs that celebrated equality, peace, humanity, and joy.

## **Oak Ridge High School**

Rebecca Whitehead's World Language program hosted its first International Night on March 5 with a great turnout. The event featured student-led stations from several clubs where attendees sampled international foods, made crafts, and played games from around the world, along with the Mucho Gusto food truck.

In Health Science, 14 ORHS seniors are participating in the DE Clinical Internship program, gaining experience in healthcare settings while preparing for their Certified Clinical Medical Assistant certification exam in April.

Seven ORHS Visual Arts students had artwork selected for display at the Astrid Galindo Student Art Exhibit at the Emporium Gallery in downtown Knoxville this month.

In addition, 33 students earned the Microsoft Office Specialist certification in Word this term through the Business Department.

**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 HS Date: 2/17/26

*The following group requests permission to leave the school campus to participate in the educational activity indicated below. Parental permission will be obtained for each student.*

Class/Group Requesting Permission: Volleyball

Educational Activity: Team Camp

Destination: MTSU

Purpose of Trip: Establish team, learn skills from collegiate players and coaches, get exp

Departure Date: 7/13/26 Departure Time: TBD

Return Date: 7/15/26 Return Time: 7:00 pm

Mode of Transportation: Undecided - Will be decided after tryouts (6/2-6/3) - Options are O

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: Stay on campus at MTSU in dorm rooms

Address: 1860 Blue Raider Dr

City: Murfreesboro State: TN Zip: 37132

Phone: 8655913292 Contact Person: Meghan Ellis

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

Name of School Sponsor/Date: Meghan Ellis

Signature of School Sponsor: Meghan Ellis Digitally signed by Meghan Ellis  
Date: 2026.02.17 08:26:25 -05'00' Cell #: 8655913292

*Minimum requires teacher to student ratio:*

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

# of Students: 25

# of Adults: Min of 2

Chaperone/Student Ratio: 1:12

**Professional Staff Chaperone(s)**

- 1. Name: Meghan Ellis Cell #: 8655913292
- 2. Name: Erica Murray Cell #: 8653063754
- 3. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

**Other Chaperone(s):**

- 1. Name: TBD after tryouts 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 \_\_\_\_\_

\$ 344.50 Per Student     
 TOTAL TRIP AMOUNT: \$ 8612.50

Provisions for those students unable to pay: Booster Club will pay for trip through  
\_\_\_\_\_  
funds raised by players. The account currently has enough to pay for the trip before fundraising for the new season, so all  
girls will be paid for even if they do not fundraise.

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

\_\_\_\_\_

\_\_\_\_\_

Staff Member: Meghan Ellis

Date: 2/17/26

Athletic Director: Joe Gaddis

Date: 2/17/26

**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: 1

Athletic Director Signature: Joe Gaddis

Date: 2/17/26

Principal's Action: Approved Disapproved:

Principal's Signature: [Signature]

Date: 2-18-26

Superintendent or Designee's Action: Approved: Disapproved:

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

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

## **Itinerary for MTSU Overnight Volleyball Camp**

- **7/13: Depart from ORHS – time TBD**
- **Eat lunch somewhere on the way**
- **Check in at MTSU**
- **Stay two nights on campus – we will not be leaving campus the entire trip.**
- **7/15: Leave MTSU**
- **7/15: Arrive back at ORHS at 7:00 pm**

**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: 2/26/26

*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 FCCLA

Educational Activity: FCCLA National Leadership Conference

Destination: Washington, D.C.

Purpose of Trip: Competing at the National Leadership Conference

Departure Date: 7/4/26 Departure Time: 8:00AM

Return Date: 7/11/26 Return Time: 10:00

Mode of Transportation: Plane/Metro/Taxi/Uber

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: Can't book till approval \_\_\_\_\_

Hotel/Motel Name: 4 star or higher dictated by conference availability

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Contact Person: \_\_\_\_\_

Number of Nights: 6 or 7 Hotel Rating: 4 or more

Name of School Sponsor/Date: Bev Sparks 2/26/26

Signature of School Sponsor: Bev Sparks Cell #: 731-733-1995

*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: 18

# of Adults: 2

Chaperone/Student Ratio: 1/9

Professional Staff Chaperone(s)

- 1. Name: Adam Sparks Cell #: 615-974-4409
- 2. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 3. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_
- 4. Name: \_\_\_\_\_ Cell #: \_\_\_\_\_

Other Chaperone(s):

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

Field Trips which exceed \$25,000 or involve out of the country travel require School Board approval, regardless of fund raising, Booster Club participation or other contributions. Please follow these guidelines when requesting approval of such trip:

- 1. Submit an "Item for Action" for the Board Agenda (Principals have directions on submitting Board Agenda items).
- 2. Attach as documentation the following items"
  - Completed Campus Leave Request
  - Details of Trip/Itinerary
  - **Justification/Explanation of Cost (per student/chaperone/total)**
  - Financial Arrangements for students who cannot afford trip (if any)
  - Insurance Details
  - Out of country travel requires a release for each student participant

Financial Arrangements: (please indicate method)

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

Substitute Required      Acct to be charged for Substitute No Sub  
 \$ 650 Per Student      TOTAL TRIP AMOUNT: \$ 12,350

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

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

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

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

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

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

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

**This Section for Athletic Trips Only**

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

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

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

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

Principal's Action:  Approved:  Disapproved:

Principal's Signature: *[Signature]*

Date: 2-26-20

Superintendent or Designee's Action: Approved:  Disapproved:

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

Board Approval Date (if required): \_\_\_\_\_



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

Name of Group: Oak Ridge High School FCCLA

Destination: Washington DC

Mode of Transportation: Plane, Trains, Taxi/Uber Purpose: National Leadership Conference

Date: 07 / 04 / 26 Time: 8AM to Date: 07 / 11 / 26 Time: 9 PM

Expected Number of Participants: 20 Expected Number of Chaperones: 2

Teacher/Sponsor of Trip: Bev Sparks

Principal Signature: *[Signature]* Date: 7 26 26

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

PARENT: Please separate this form and return to: Sparks by: 5/1/26  
 (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



# 2026 National Leadership

As of 1/30/2026

Thursday, March 5, 2026 7:00 PM (EST) Registration Information Webinar  
 Thursday, June 11, 2026 7:00 PM (EST) Virtual First Time Attendee Webinar

## Saturday, July 4, 2026

START	END	EVENT
8:00 AM	6:00 PM	State Adviser City Acclimation

## Sunday, July 5, 2026

START	END	EVENT
9:00 AM	5:00 PM	Conference Registration (Day 1)
10:00 AM	12:00 PM	National Officer Candidate Adviser Orientation
10:00 AM	12:00 PM	National Officer Candidate Orientation & Project Center
10:00 AM	11:30 AM	National Officer Candidate Nominating Committee Orientation & Meeting
1:00 PM	8:00 PM	National Officer Candidate Nominating Committee Interviews
3:00 PM	4:00 PM	Skill Demonstration Event Lead Consultant Orientation
5:00 PM	7:30 PM	State Advisers Session & Welcome Reception

## Monday, July 6, 2026

Day 1

### COMPETITIVE EVENT COMPETITIONS: (Subject to Change)

*Challenge Testing*

*Skill Demonstration Events*

*AI for Impact Pilot STAR Event*

8:00 AM	6:30 PM	Conference Registration (Day 2)
8:00 AM	9:30 AM	National Officer Candidate Fishbowl
8:00 AM	8:30 AM	Skill Demonstration Event Consultant/Evaluators Orientation
9:00 AM	4:00 PM	Skill Demonstration Event Competitions
9:00 AM	4:00 PM	Challenge Testing
10:30 AM	12:00 PM	National Officer Candidate Nominating Committee Deliberations
12:00 PM	12:50 PM	Adviser Professional Development Session
12:30 PM	1:00 PM	Voting Delegate Orientation (Check-in at 12:00 PM)
12:30 PM	1:30 PM	STAR Events Lead / Assistant Lead Consultants Organizational Meeting
1:00 PM	1:50 PM	Adviser Professional Development Session
1:00 PM	2:00 PM	Youth Networking – Through 8th Grade
1:00 PM	2:00 PM	Youth Networking – 9th Grade and Above
1:00 PM	3:00 PM	EXPO Exhibitor Move-In
1:30 PM	2:30 PM	STAR Events Adult Room Consultant Orientation
1:30 PM	3:00 PM	State Officer Networking*
2:00 PM	2:50 PM	Adviser Professional Development Session
3:00 PM	4:00 PM	State Meetings
4:15 PM	5:15 PM	State Meetings
6:00 PM	9:00 PM	General Session: Opening General Session (Doors Open at 5:15 PM)

*-Welcome/Greetings*

*-Award Presentations*

*-Keynote Address*



# 2026 National Leadership

As of 1/30/2026

Tuesday, July 7, 2026

Day 2

**STAR EVENT COMPETITIONS: (Subject to Change)**

- Baking and Pastry (Offsite)*
- Culinary Arts (Offsite)*
- Digital Stories for Change*
- Entrepreneurship*
- Event Management*
- Fashion Construction*
- Fashion Design*
- FCCLA Chapter Website*
- Focus on Children*
- Food Innovations*
- Hospitality, Tourism, and Recreation*

- Interior Design*
- Leadership*
- National Programs in Action*
- Nutrition & Wellness*
- Parliamentary Procedure*
- Personal Finance*
- Professional Presentation*
- Public Policy Advocate*
- Say Yes to FCS Education*
- Sports Nutrition*
- Sustainability Challenge*

7:00 AM	5:00 PM	Conference Information
7:30 AM	8:30 AM	STAR Events Room Consultants, Evaluators and Volunteers Meeting
8:00 AM	4:00 PM	EXPO (Day 1 of 2)
8:00 AM	4:00 PM	FCCLA Store (Day 1 of 2)
8:00 AM	9:00 AM	National Officer Candidate Networking (All Members)
9:00 AM	5:00 PM	STAR Event Competitions
9:15 AM	11:15 AM	RED Talks Presentations <i>Fun 15-minute workshops led by youth, advisers, exhibitors and partners.</i>
9:30 AM	11:30 AM	National Officer Candidate Networking (Voting Delegates ONLY)
9:30 AM	11:30 AM	Adviser Networking Roundtables (Day 1) <i>- Roundtable discussions led by advisers and partners</i>
9:30 AM	12:00 PM	Youth Workshops
11:00 AM	3:00 PM	Lunch Concessions
1:00 PM	2:00 PM	General Session: National Officer Candidate Speeches - Group A (Voting Delegate check-in at 12:30 PM)
1:00 PM	2:00 PM	National Officer Candidate Teambuilding – Group B
1:45 PM	3:30 PM	RED Talks Presentations <i>Fun 15-minute workshops led by youth, advisers, exhibitors and partners.</i>
2:00 PM	4:00 PM	Youth Workshops
2:15 PM	3:15 PM	General Session: National Officer Candidate Speeches - Group B
2:15 PM	3:15 PM	National Candidate Teambuilding – Group A
4:00 PM	4:45 PM	State Meetings
4:30 PM	6:00 PM	National Executive Council Elections (Election Voting Delegates Only)
5:00 PM	5:45 PM	State Meetings
4:00 PM	5:30 PM	Dinner on Own
6:00 PM	10:00 PM	Special Event: FCCLA Night at the Washington Nationals



# 2026 National Leadership

As of 1/30/2026

Wednesday, July 8, 2026

Day 3

**STAR EVENT COMPETITIONS: (Events subject to change)**

*Baking and Pastry (Offsite)*

*Career Investigation*

*Chapter in Review Display*

*Chapter in Review Portfolio*

*Chapter Service Project Display*

*Chapter Service Project Portfolio*

*Culinary Arts (Offsite)*

*Early Childhood Education*

*Instructional Video Design*

*Interpersonal Communications*

*Job Interview*

*Promote and Publicize FCCLA*

*Red Talks on Education*

*Repurpose and Redesign*

*Teach or Train*

*Teaching Strategies*

7:00 AM	5:00 PM	Conference Information/Registration Desk
7:30 AM	8:30 AM	STAR Events Room Consultants, Evaluators, and Volunteers Meeting
8:00 AM	4:00 PM	EXPO (Day 2 of 2)
8:00 AM	4:00 PM	FCCLA Store (Day 2 of 2)
8:15 AM	10:45 AM	RED Talks Presentations
8:30 AM	9:15 AM	FCCLA/LifeSmarts Knowledge Bowl Volunteer Orientation
8:30 AM	11:15 AM	Youth Workshops
9:00 AM	5:00 PM	STAR Event Competitions
9:00 AM	10:00 AM	Adviser Professional Development -Sponsored
9:30 AM	10:00 AM	FCCLA/LifeSmarts Knowledge Bowl Morning Teams Orientation
10:00 AM	11:00 AM	General Session: Business Session (Doors Open at 9:30 AM)
10:00 AM	12:30 PM	FCCLA/LifeSmarts Knowledge Bowl Morning Teams Pool Play
11:00 AM	12:00 PM	Adviser Professional Development -Sponsored
11:00 AM	2:00 PM	Lunch Concessions
1:00 PM	2:00 PM	State Officer Training*
1:00 PM	3:00 PM	Adviser Networking Roundtables (Day 2) - Roundtable discussions led by advisers and partners
1:30 PM	2:00 PM	FCCLA/LifeSmarts Knowledge Bowl Afternoon Teams Orientation
1:45 PM	3:30 PM	RED Talks Presentations
2:00 PM	3:00 PM	Future Teachers Session
2:00 PM	4:00 PM	Youth Workshops
2:00 PM	4:30 PM	FCCLA/LifeSmarts Knowledge Bowl Afternoon Teams Pool Play
3:30 PM	4:00 PM	FCCLA Showcase - Participant Check-In
4:00 PM	6:00 PM	FCCLA Showcase -View program award winning projects and highlighted STAR Event projects
4:00 PM	6:00 PM	EXPO Exhibitor Move-Out
6:00 PM	9:00 PM	General Session: Member Recognition (Doors Open at 5:30 PM) -Program, Skill Demonstration Event, and Challenge Testing Awards -Say Yes to FCS Signing Ceremony



## 2026 National Leadership

As of 1/30/2026

### Thursday, July 9, 2026

Day 4

8:00 AM	11:00 AM	Conference Information
8:00 AM	11:00 AM	FCCLA/LifeSmarts Knowledge Bowl Quarterfinals, Semifinals, and 3rd Place Match
9:00 AM	10:00 AM	Rally on the Hill <i>-Advocate for FCS Education on Capital Hill</i>
10:00 AM	4:30 PM	Afternoon Open for Hill Visits or Sightseeing
6:00 PM	9:00 PM	General Session: Adviser Recognition & Fashion Show & Knowledge Bowl Finals (Doors Open at 5:30 PM) <i>-FCCLA/LifeSmarts Knowledge Bowl Final Competition</i> <i>-Fashion Show</i> <i>-Award Presentations (Adviser, Membership)</i> <i>-Introduction of 2026-2027 National Executive Council</i>

### Friday, July 10, 2026

Day 5

8:00 AM	5:00 PM	Conference Information
7:00 AM	8:00 AM	State STAR Events Recognition Session Pickup (State Advisers Only)
7:30 AM	8:00 AM	STAR Events Finalist Recognition Session - Volunteers Report to Holding Room
8:00 AM	8:30 AM	STAR Events Finalist Recognition Session - Finalists Report to Holding Room
9:00 AM	11:30 AM	<b>General Session: STAR Events Finalist Session (Doors Open at 8:30 AM)</b>
12:00 PM	1:00 PM	State STAR Events Recognition Sessions: Group A
1:30 PM	2:30 PM	State STAR Events Recognition Sessions: Group B
4:00 PM	5:30 PM	General Session: Closing General Session (Doors Open at 3:30 PM) <i>-Scholarship Presentations</i> <i>-Farewell to 2025-2026 National Executive Council</i> <i>-Conference in Review</i>
5:30 PM	7:30 PM	Dinner (On Own)
7:30 PM	10:30 PM	Special Event: FCCLA NLC After Party*

\* indicates pre-registration required.

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

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

School: ORHS Date: 1/8/2026

*The following group requests permission to leave the school campus to participate in the educational activity indicated below. Parental permission will be obtained for each student.*

Class/Group Requesting Permission: Secret City Wildbots -FRC Team 4265

Educational Activity: Robotics Competition

Destination: George R Brown Convention Center, Houston, TX

Purpose of Trip: Compete at FIRST Robotics World Championships

Departure Date: 4/15/2026 Departure Time: 5:30 am

Return Date: 4/20/2026 Return Time: 11:00 pm

Mode of Transportation: Parents & Mentors transport to airport; Plane to/from Houston, & F

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: C.Scott, Mark & Lisa Buckner, Janie Shanafield

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: Still looking for hotels - only open to us when we qualify

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

City: Houston State: TX Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Contact Person: \_\_\_\_\_

Number of Nights: 5 Hotel Rating: \_\_\_\_\_

Name of School Sponsor/Date: Lisa Buckner

Signature of School Sponsor: Lisa Buckner Digitally signed by Lisa Buckner  
Date: 2025.01.08 18:24:57 -05'00' Cell #: 8652077036

*Minimum requires teacher to student ratio:*

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

# of Students: 25 # of Adults: 5 Chaperone/Student Ratio: 1:5

Professional Staff Chaperone(s)

- 1. Name: Lisa Buckner Cell #: 8652077036
- 2. Name: Mark Buckner Cell #: 8652284270
- 3. Name: Christopher Scott Cell #: 8652234098
- 4. Name: Janie Shanafield Cell #: 8654059435

Other Chaperone(s):

- 1. Name: Harold Shanafield Cell #: 8654059436
- 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 \_\_\_\_\_

\$ approx 650 Per Student      TOTAL TRIP AMOUNT: \$ 20000

Provisions for those students unable to pay: Scholarships will be found for students unable to pay.

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

This is all preliminary info - assuming we qualify for Championship, we will then find out hotels & flights available to us.

Staff Member: Lisa Buckner

Date: 1/8/2026

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

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

**This Section for Athletic Trips Only**

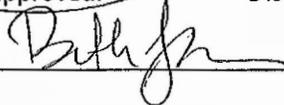
At the high school level up to three events and/or tournaments per season can involve an overnight trip. However, no more than one day of school may be missed for these trips. (Under certain conditions, the Superintendent of Schools or designee may approve additional events. These trips must be paid 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: 

Date: 3.13.26

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 Secret City Wildbots Team 4265

Destination: George R Brown Convention Center, Houston, TX

Mode of Transportation: Car/Plane/Van Purpose: Compete at World Championships

Date: 4 / 15 / 26 Time: 5:30 am to Date: 4 / 20 / 26 Time: 11:00 pm

Expected Number of Participants: 25 Expected Number of Chaperones: 5

Teacher/Sponsor of Trip: Mark & Lisa Buckner

Principal Signature: *Duffy* Date: 8.13.26

### Fee Requested (if any)\*

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

PARENT: Please separate this form and return to : Mrs. Buckner by: 4/7/2026  
 (Teacher) (Date)

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

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

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

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

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

\_\_\_\_\_  
 Date

Please provide 2 Emergency Contact Phone Numbers

\_\_\_\_\_  
 Name/Relationship

\_\_\_\_\_  
 Number

\_\_\_\_\_  
 Name/Relationship

\_\_\_\_\_  
 Number

## **Secret City Wildbots 2026 Houston (TENTATIVE) Itinerary (4/15/26 – 4/20/26)**

### **Tuesday, April 28, 2026**

5:30 am – Leave Oak Ridge High School  
7:00 am – Arrive Nashville International Airport  
8:30 am – Leave Nashville for Houston on Southwest Airlines  
10:40 am – Arrive Houston IAH Airport  
11:15 am – Head to Johnson Space Center for Tour  
1:00 pm – Tour Johnson Space Center  
5:00 pm – Leave Johnson Space Center for dinner  
8:00 pm – Arrive at Airbnb

### **Wednesday April 29, 2026**

9:30 am – Arrive George R. Brown Convention Center for Unloading at 10:00 am  
12:00 pm – Hall of Fame Ceremony on Turing Field  
2:00 pm – Field Measurements for teams & Pits Open for teams  
3:00 pm – Safety Captains Meeting – Turing Field  
4:00 pm – Driver's Meeting on Galileo Field  
4:00 pm – Check in to VRBO & Cook Dinner (some of team)  
5:00 – 7:00 pm – Practice Matches  
7:30 pm – Leave Convention Center for Airbnb & Eat Dinner  
10:00 pm – Lights Out

### **Thursday April 30, 2026**

6:30 am – Head to Convention Center – Pits Open  
7:00 am – Pits Open  
7:30 am – Robot Sensor Calibration on fields  
8:30 am – Qualification Matches start  
11:00 am -1:30 pm – Staggered Lunch Breaks (each field 1 ½ hours)  
6:30 pm – Pits and Machine Shops Close  
7:00 pm – Dinner at Airbnb

### **Friday, May 1, 2026**

6:30 am – Head to Convention Center – Pits Open  
7:00 am – Pits Open  
8:00 am – Qualification Matches begin  
11:00 am -1:30 pm – Staggered Lunch Breaks (each field 1 ½ hours)  
5:00 pm – Division Award Ceremonies  
6:00 pm – Pits and Machine Shops Close  
7:00 pm – Dinner at Airbnb

### **Saturday, May 2, 2026** 6:30 am – Head to Convention Center

7:00 am – Pits Open & Chairman's Finalists & Alliance Selections  
8:30 am – 11:30 am – Division Playoffs  
8:30 am – 11:30 4:00 pm – Load Out  
11:30 am – 1:30 pm – Lunch Break  
1:30 pm – 2:15 pm Closing Celebration  
2:00 pm – Pits Close  
2:15 – 5:30 pm Event Finale, Einstein Round Robin & Final Matches  
7:00 pm – Dinner Celebration at Airbnb

**Sunday, May 3, 2026**

8:30 am – Breakfast and Pack Vans for Airport

10:00 am – Leave for Houston IAH Airport to drop Vans

1:05 pm – Depart Houston on Southwest Airlines

2:55 pm – Arrive Nashville

5:00 pm – Stop for Dinner enroute

8:00 pm – Arrive in Oak Ridge



## Secret City Wildbots 2026 Houston Survival Guide

### Event Venue:

George R. Brown Convention Center

### Coach/Chaperone Phone Numbers:

(865) 223-4098 Mr. Scott

(865) 207-7036 Mrs. Buckner

(865) 228-4270 Dr. Buckner

(865) 405-9435 Janie Shanafield

**Lodging:** Still working on this

We will leave the ORHS parking lot outside the Robotics Room on Tuesday, April 15, 2024. Time to be determined based on flight information. When we land, we will pick up rental vans at airport in Houston and travel to our lodging accommodations. (still working on this)

Unloading, Pit Set up, and the Competition will begin Wednesday and continue through Saturday. On Sunday, our flight # \_\_\_\_\_ leaves Houston at \_\_\_\_\_ pm and will arrive in Nashville at \_\_\_\_\_ pm and we hope to be back in Oak Ridge by \_\_\_\_\_ pm. We will stop to eat dinner on the way home from the airport.

**Costs: (Working these costs out)**

**Flight Cost:**

**Food costs:**

**Lodging & Transportation costs:**

**ALSO, donations of Bottled Water & snack foods (please pick something your student will eat) are requested – Plan to bring these by April 12<sup>th</sup> (We will send these with Christopher Scott with the pit stuff and they will be used daily for snacks)**

**Medication:** Medicines must be clearly labeled and placed in an appropriately sized zip-lock bag. Instructions should be written out for specific dosage and time on separate sheet of paper and placed inside the plastic bag with the medicine. **All medicines will be given to Mrs. Buckner before loading on the day of departure.** Students may not keep their own medicines in their rooms. If desired, sign the attached Non-Prescription Medicine form for dispensing of certain non-prescription medications.

**Flight Information: (Will work this out when we know for certain we have an invitation)**

**What to Bring on Trip:**

**Snacks & Water:** Students are encouraged to bring non-perishable snack foods and water to the competition – as snacks will be expensive at the competition. It should be easy to put water and a few snacks into their backpacks each day. We will be there ALL DAY long. We will send snacks with Mr. Scott in the trailer so **we will need these by Saturday, April 12<sup>th</sup>.**

**Clothes: Be sure and pack TEAM SHIRTS!** These should be worn Wednesday, Thursday, Friday and Saturday. Also, **MASKS** will be required inside the convention center, so bring plenty, they will not be providing them. Also make sure you have **Comfortable, CLOSE-TOED SHOES and BRING**

**YOUR SAFETY GLASSES (If you have them at home) I also suggest you bring an umbrella or a rain jacket...just in case!**

**Behavior: (Please review these with your parents) Remember you are representing ORHS, the Secret City Wildbots and FIRST! No students leaving our lodging or convention premises without permission from Mr. Scott, Dr. Buckner, or Mrs. Buckner. No students leaving their rooms after curfew without mentor permission. No girls in boys' rooms and no boys in girls' rooms! Anyone breaking this rule will be sent home immediately! NO EXCEPTIONS! Anyone out of his or her room will be sent home the next morning at your own expense. NO EXCEPTIONS!**

**PARENTS\*\*\*\*FYI:** Go to <https://www.twitch.tv/firstinspires> This should be working Wednesday (practice matches) and Thursday & Friday (Qualification Matches) and Saturday. When we get our division and match schedules, we will post it on Slack and on Twitter! We hope you will watch our matches!\*\*\*\*



# 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'26 Budget Transfer #2**  
**Date:** February 23, 2026

The attached FY'26 Budget Transfer #2 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, Instructional Textbooks & Software, Attendance Plus Software, and ACT Testing costs.
- Establish budget in capital outlay expenditure for the Glenwood Chiller Replacement.
- Establish initial grant budgets for multiple federal grants, including:
  - TSW
  - Title 3
  - Title 4
- Establish initial budgets for multiple state grants, including:
  - Department of Transportation Aviation Education Grant
- Establish budgets for multiple local grants, including:
  - Benita Albert Award Grant
- Routine budget transfers and revisions from November 11, 2025, through February 17, 2026.

## FY 26 FYTD Budget Summary - Budget Transfer #2

Fund	FY26 Original Approved Budget	Budget Amendment #1	Budget Transfer #1 & #2	FY26 Revised & Amended Budget Amounts
Fund 141 (General Fund)	\$ 83,188,805.00	\$ -	\$ -	\$ 83,188,805.00
Fund 142 (Federal)	\$ 4,642,000.00	\$ -	\$ -	\$ 4,642,000.00
Fund 143 (Food Service)	\$ 3,649,340.00	\$ -	\$ -	\$ 3,649,340.00
Fund 145 (Other Education)	\$ 171,698.00	\$ -	\$ -	\$ 171,698.00
Fund 146 (Extended Child Care)	\$ 570,177.00	\$ -	\$ -	\$ 570,177.00
<b>TOTAL All Funds</b>	<b>\$ 92,222,020.00</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ 92,222,020.00</b>

## Fund 141 Budget Transfers

Fund 141 REVENUES	Account Number	Decrease	Increase
Establish FY26 Aviation Education Grant	141 R 46980 000 000 00000 000	\$ 20,000.00	\$ -
	141 R 46980 000 021 00000 000	\$ -	\$ 20,000.00
Establish Benita Albert Award	141 R 44570 000 000 00000 000	\$ 30,017.00	\$ -
	141 R 44570 000 000 00000 112	\$ -	\$ 30,017.00
<b>Fund 141 EXPENDITURES</b>			
Fund 141 EXPENDITURES	Account Number	Increase	Decrease
Establish FY26 Aviation Education Grant	141 E 71300 429 021 00035 000	\$ 10,000.00	\$ -
	141 E 71300 730 021 00035 000	\$ 10,000.00	
	141 E 71900 599 000 00000 000	\$ -	\$ 20,000.00
Transfer for Instructional Supplies	141 E 72210 196 000 00082 000	\$ -	\$ 1,200.00
	141 E 72210 429 000 00082 000	\$ 1,200.00	\$ -
Establish Benita Albert Award	141 E 72210 524 000 00000 112	\$ 30,017.00	\$ -
	141 E 71900 599 000 00000 000	\$ -	\$ 30,017.00
<b>TOTAL</b>		<b>\$ 101,234.00</b>	<b>\$ 101,234.00</b>

## Fund 142 Budget Transfers

Fund 142 REVENUES	Account Number	Decrease	Increase
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<b>Establish FY26 Title III Grant Budget</b>	142 R 47590 000 000 00000 000	\$ 13,926.52	\$ -
	142 R 47146 000 303 00000 000	\$ -	\$ 13,926.52

<b>Establish FY26 Title IV Grant Budget</b>	142 R 47590 000 000 00000 000	\$ 16,982.62	\$ -
	142 R 47590 000 411 00000 000	\$ -	\$ 16,982.62

<b>Establish TSW Grant</b>	142 R 47590 000 000 00000 000	\$ 22,584.10	\$ -
	142 R 47590 000 045 00000 000	\$ -	\$ 22,584.10

Fund 142 EXPENDITURES	Account Number	Increase	Decrease
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<b>Establish FY26 Title III Grant Budget</b>	142 E 72210 189 303 00000 000	\$ -	\$ 1,891.91
	142 E 72210 201 303 00000 000		\$ 117.37
	142 E 72210 204 303 00000 000		\$ 106.71
	142 E 72210 206 303 00000 000		\$ 3.20
	142 E 72210 207 303 00000 000		\$ 254.54
	142 E 72210 208 303 00000 000		\$ 6.07
	142 E 72210 212 303 00000 000		\$ 27.35
	142 E 72210 299 303 00000 000		\$ 2.23
	142 E 72210 499 303 00000 000	\$ 23,567.11	
	142 E 72210 524 303 00000 000	\$ 8,284.79	
	142 E 99100 504 303 00000 000	\$ 858.00	
	142 E 72130 000 000 00000 000		\$ 997.41
	142 E 73300 000 000 00000 000	\$ -	\$ 29,303.11

<b>Establish FY 26 Title IV Grant Budget</b>	142 E 72120 524 411 00000 000	\$	11,815.72	\$	-
	142 E 72130 189 411 00025 000			\$	0.50
	142 E 72130 201 411 00025 000			\$	0.36
	142 E 72130 204 411 00025 000	\$	0.37		
	142 E 72130 206 411 00025 000			\$	3.00
	142 E 72130 208 411 00025 000	\$	8.50		
	142 E 72130 212 411 00025 000	\$	0.25		
	142 E 72130 299 411 00025 000	\$	0.25		
	142 E 72130 599 411 00000 000	\$	22,849.36		
	142 E 72250 399 411 00008 000	\$	3,957.03		
	142 E 72250 471 411 00000 000	\$	500.00		
	142 E 99100 504 411 00000 000	\$	1,745.00		
	142 E 73300 000 000 00000 000	\$	-	\$	40,872.62

<b>Establish TSW Grant</b>	142 E 71200 201 045 00000 000	\$	-	\$	107.00
	142 E 71200 204 045 00000 000			\$	27.00
	142 E 71200 206 045 00000 000			\$	12.00
	142 E 71200 207 045 00000 000			\$	414.00
	142 E 71200 208 045 00000 000	\$	36.00		
	142 E 71200 212 045 00000 000	\$	-	\$	25.00
	142 E 72210 201 045 00000 000			\$	25.00
	142 E 72210 204 045 00000 000			\$	68.00
	142 E 72210 206 045 00000 000			\$	6.00
	142 E 72210 208 045 00000 000	\$	18.00		
	142 E 72210 212 045 00000 000			\$	6.00
	142 E 71900 000 000 00000 000	\$	636.00	\$	-

<b>TOTAL</b>		\$	<b>127,769.62</b>	\$	<b>127,769.62</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	\$ 40,000.00	
Additional Substitute Pay - SPED TA	141-71200-163---195	\$ 10,000.00	
Additional Substitute Pay - CTE	141-71300-195	\$ 10,000.00	
Additional Substitute Pay - PK	141-73401-195	\$ 2,000.00	
Liability Insurance Premium	141-72310-506	\$ 2,186.00	
Surety Bond Premium	141-72310-508	\$ 160.00	
Content Insurance Premium	141-72610-502	\$ 10,000.00	
Trustee Commission	141-72310-510	\$ 20,000.00	
Vehicle Insurance Premium	141-72710-511	\$ 1,665.00	
GW Chiller	141-76100-707--413	\$ 225,000.00	
Additional Textbook Cost	141-71100-430	\$ 3,500.00	
Additional Textbook Cost	141-71100-449	\$ 5,000.00	
Additional Instructional Software Cost	141-71100-471	\$ 86,000.00	
Attendance Plus Software	141-72290-399	\$ 1,500.00	
Pre ACT Testing	141-72130-322	\$ 3,210.00	
		\$ -	
<b>TOTAL New Spending Requests</b>		<b>\$ 420,221.00</b>	

### Payroll, Benefit, & Other Budgetary Changes: Based on current Budget to Actual vs Payroll Encumbrances on 1/30/26

<b>Regular Education Teachers</b>	141-71100-116	\$ (100,000.00)
Career Ladder	141-71100-117	\$ (2,000.00)
Homebound Teachers	141-71100-128	\$ (1,500.00)
Educational Assistants	141-71100-163	\$ (15,000.00)
Bonus Payments	141-71100-188	\$ (10,000.00)
Other Salaries	141-71100-189--320	\$ (2,800.00)
Social Security	141-71100-201	\$ (50,000.00)

State Retirement	141-71100-204		\$	(15,000.00)
Life Insurance	141-71100-206		\$	(2,000.00)
Medical Insurance	141-71100-207	\$	22,000.00	\$ -
Dental Insurance	141-71100-208	\$	8,000.00	\$ -
Employer Medicare	141-71100-212		\$	(11,000.00)
SRT State Retirement	141-71100-217	\$	15,000.00	
Vision Insurance	141-71100-299	\$	400.00	\$ -
Equipment	141-71100-722--226		\$	(238,000.00)
<b>Alternative Education Teachers</b>	141-71150-116-00036	\$	23,516.00	\$ -
Educational Assistants	141-71150-163 -00036	\$	-	\$ (3,000.00)
Social Security	141-71150-201-00036	\$	2,100.00	\$ -
State Retirement	141-71150-204-00036	\$	-	\$ (800.00)
Life Insurance	141-71150-206-00036	\$	108.00	
Medical Insurance	141-71150-207-00036	\$	39,500.00	\$ -
Dental Insurance	141-71150-208-00036	\$	705.00	
Employer Medicare	141-71150-212-00036	\$	500.00	
SRT State Retirement	141-71150-217-00036	\$	1,020.00	\$ -
Vision Insurance	141-71150-299-00036	\$	150.00	\$ -
<b>Special Education</b>				
Teachers	141-71200-116-00050		\$	(62,500.00)
Teachers	141-71200-116-00030		\$	(45,000.00)
Educational Assistants	141-71200-163	\$	96,000.00	\$ -
Social Security	141-71200-201	\$	1,000.00	
Medical Insurance	141-71200-207	\$	-	\$ (8,204.00)
Dental Insurance	141-71200-208	\$	1,600.00	
Employer Medicare	141-71200-212	\$	550.00	
SRT State Retirement	141-71200-217	\$	4,000.00	
Vision Insurance	141-71200-299	\$	50.00	
<b>Vocational Education</b>				
Educational Assistants	141-71300-163-00035-195	\$	-	\$ (500.00)
Social Security	141-71300-201		\$	(1,000.00)

State Retirement	141-71300-204		\$	(3,000.00)
Medical Insurance	141-71300-207-00035		\$	(10,000.00)
Dental Insurance	141-71300-208	\$	450.00	
Employer Medicare	141-71300-212		\$	(300.00)
SRT State Retirement	141-71300-217	\$	1,500.00	\$ -
<b>Instructional Contingency</b>	141-71900-001	\$	-	\$ (94,210.00)
Instructional Contingency - Salary/Benefit	141-71900-002	\$	-	\$ (81,370.00)
Instructional Contingency - Other	141-71900-004	\$	-	\$ (39,634.00)
<b>Health Services</b>				
Medical Personnel	141-72120-131	\$	40,000.00	\$ -
Social Security	141-72120-201	\$	2,500.00	\$ -
State Retirement	141-72120-204	\$	4,000.00	
Life Insurance	141-71120-206	\$	12.00	
Medical Insurance	141-72120-207	\$	-	\$ (20,000.00)
Employer Medicare	141-72120-212	\$	700.00	\$ -
SRT State Retirement	141-72120-217	\$	2,200.00	
<b>Other Student Support</b>				
Social Security	141-72130-201	\$	-	\$ (1,000.00)
State Retirement	141-72130-204	\$	850.00	\$ -
Medical Insurance	141-72130-207	\$	7,800.00	
Dental Insurance	141-72130-208	\$	200.00	\$ -
Employer Medicare	141-72130-212			\$ (100.00)
SRT State Retirement	141-72130-217	\$	150.00	\$ -
<b>Instructional Support</b>				
Librarians	141-72210-129	\$	1,305.00	\$ -
Secretaries	141-72210-161			\$ (2,100.00)
Instructional Coaches	141-72210-172	\$	3,100.00	\$ -
Other Salaries & Wages	141-72210-189	\$	56,200.00	\$ -
Social Security	141-72210-201	\$	10,000.00	\$ -
State Retirement	141-72210-204	\$	5,000.00	\$ -

Life Insurance	141-72210-206	\$	160.00	\$	-
Medical Insurance	141-72210-207	\$	25,000.00	\$	-
Dental Insurance	141-72210-208	\$	850.00		
Employer Medicare	141-72210-212	\$	2,400.00	\$	-
Vision Insurance	141-72210-299	\$	200.00	\$	-
<b>Special Education Support</b>					
Supervisor/Director	141-72220-105	\$	1.00	\$	-
Psychological Personnel	141-72220-124	\$	7,365.00		
Social Security	141-72220-201	\$	150.00		
Life Insurance	141-72220-206			\$	(150.00)
Medical Insurance	141-72220-207			\$	(7,000.00)
Dental Insurance	141-72220-208	\$	93.00		
Employer Medicare	141-72220-212	\$	35.00		
SRT State Retirement	141-72220-217	\$	2,010.00		
<b>Technology Career Support</b>					
Secretaries	141-72230-161	\$	1.00		
Social Security	141-72230-201			\$	(175.00)
Medical insurance	141-72230-207	\$	1,800.00		
Dental Insurance	141-72230-208	\$	24.00		
Employer Medicare	141-72230-212	\$	50.00		
<b>Technology Services</b>					
Data Processing Personnel	141-72250-121	\$	-	\$	(30,000.00)
Social Security	141-72250-201			\$	(2,000.00)
Retirement	141-72250-204	\$	-	\$	(11,700.00)
Medical Insurance	141-72250-207	\$	-	\$	(10,000.00)
Dental Insurance	141-72250-208	\$	15.00		
Employer Medicare	141-72250-212			\$	(500.00)
SRT State Retirement	141-72250-217	\$	700.00		
Vision Insurance	141-72250-299			\$	(100.00)
Contracted Services	141-72250-399	\$	3,111.00		

**Communications**

Social Security	141-72290-201	\$	-	\$	(200.00)
State Retirement	141-72290-204	\$	-	\$	(100.00)
Medical Insurance	141-72290-207	\$	-	\$	(100.00)
Dental Insurance	141-72290-208	\$	36.00		
Medicare	141-72290-212	\$	110.00		
SRT State Retirement	141-72290-217	\$	108.00		

**Board of Education**

Social Security	141-72310-201	\$	700.00		
Unemployment Compensation	141-72310-210	\$	4,000.00	\$	-
Employer Medicare	141-72310-212	\$	300.00		
Termination Benefits	141-72310-214	\$	20,000.00		
Auditing Services	141-72310-305	\$	1,500.00		
Worker's Compensation Insurance	141-72310-513			\$	(10,000.00)

**Office of Superintendent**

Social Security	141-72320-201	\$	550.00		
State Retirement	141-72320-204	\$	-	\$	(200.00)
Life Insurance	141-72320-206	\$	-	\$	(50.00)
Medical Insurance	141-72320-207			\$	(200.00)
Dental Insurance	141-72320-208	\$	35.00		
Employer Medicare	141-72320-212			\$	(100.00)
SRT State Retirement	141-72310-217	\$	60.00		

**Office of Principal Principals**

Principals	141-72410-104-00040	\$	-	\$	(49,500.00)
Principals	141-72410-104-00035	\$	-	\$	(13,000.00)
Career Ladder	141-72410-117	\$	-	\$	(500.00)
Bookkeepers	141-72410-119-00040	\$	-	\$	(6,000.00)
Assistant Principals	141-72410-139-00025	\$	160.00		
Secretary	141-72410-161-00050	\$	-	\$	(21,000.00)
Secretary	141-72410-161-00045	\$	-	\$	(4,000.00)
Secretary	141-72410-161			\$	(60,000.00)
Social Security	141-72410-201	\$	-	\$	(5,000.00)

Social Security	141-72410-201-00040		\$	(7,000.00)
State Retirement	141-72410-204-00040	\$	-	\$ (8,000.00)
Life Insurance	141-72410-206	\$	-	\$ (250.00)
Medical Insurance	141-72410-207	\$	-	\$ (8,000.00)
Dental Insurance	141-72410-208	\$	1,200.00	
Employer Medicare	141-72410-212	\$	-	\$ (2,500.00)
SRT State Retirement	141-72410-217	\$	1,350.00	\$ -
Vision Insurance	141-72410-299	\$	50.00	
<b>Fiscal Services</b>				
Purchasing	141-72510-122		\$	(100.00)
Clerical Personnel	141-72510-161	\$	-	\$ (20,000.00)
Medical Insurance	141-72510-207	\$	5,500.00	
Dental Insurance	141-72510-208	\$	200.00	
Employer Medicare	141-72510-212			\$ (300.00)
SRT State Retirement	141-72510-217	\$	500.00	\$ -
<b>Human Resources</b>				
State Retirement	141-72520-204	\$	-	\$ (100.00)
Medical Insurance	141-72520-207	\$	3,500.00	
Dental Insurance	141-72520-208	\$	75.00	
SRT State Retirement	141-72520-217	\$	250.00	
<b>Operation of Plant</b>				
Custodial Personnel	141-72610-166			\$ (40,000.00)
Social Security	141-72610-201	\$	-	\$ (3,000.00)
State Retirement	141-72610-204			\$ (12,000.00)
Medical Insurance	141-72610-207			\$ (5,000.00)
Dental Insurance	141-72610-208	\$	400.00	
Employer Medicare	141-72610-212	\$	-	\$ (700.00)
<b>Maintenance of Plant</b>				
Supervisor/Director	141-72620-105	\$	28,000.00	
Secretaries	141-72620-161	\$	1.00	

Maintenance Personnel	141-72620-167	\$	-	\$	(52,000.00)
Social Security	141-72620-201			\$	(1,500.00)
State Retirement	141-72620-204			\$	(4,500.00)
SRT State Retirement	141-72620-217	\$	500.00	\$	-
<b>Capital Improvement - Prior Year PO Budget</b>	141-76100-707-001-460	\$	143,000.00		
<b>Preschool Program</b>					
Principal	141-73401-104	\$	1.00		
Teachers	141-73401-116	\$	133,895.00	\$	-
Medical Personnel	141-73401-131			\$	(100.00)
Secretaries	141-73401-161	\$	10,250.00	\$	-
Overtime	141-73401-187	\$	-	\$	(500.00)
Other Salaries & Wages	141-73401-189	\$	330.00		
Social Security	141-73401-201	\$	12,000.00		
State Retirement	141-73401-204	\$	11,000.00	\$	-
Life Insurance	141-73401-206	\$	164.00	\$	-
Medical Insurance	141-73401-207	\$	16,500.00		
Dental Insurance	141-73401-208	\$	991.00		
Employer Medicare	141-73401-212	\$	2,835.00		
SRT State Retirement	141-73401-217	\$	500.00		
Vision Insurance	141-73401-299	\$	240.00		
<b>TOTAL</b>			<b>\$ 1,217,143.00</b>	<b>\$</b>	<b>(1,217,143.00)</b>



# Oak Ridge Schools

OFFICE OF  
Finance Director

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:** Recommendation of Audit Firm for FY '26 Audit  
**Date:** March 30, 2026

I recommend that Oak Ridge Schools approve the Audit Firm of Brown Jake & McDaniel, PC for performance of the FY26 Annual Audit. The attached Engagement Letter for the Board of Education audit for FY26 totals \$56,000.00 plus hourly rates for non-audit services. The Internal School Funds audit engagement letter was approved at the September 22, 2025 Board of Education meeting. The auditing services are budgeted in account code 141-72310-305.

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

# BROWN JAKE & McDANIEL, PC

CERTIFIED PUBLIC ACCOUNTANTS  
2607 KINGSTON PIKE, SUITE 110  
KNOXVILLE, TENNESSEE 37919-3336  
865/637-8600 • fax: 865/637-8601  
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MEMBERS  
AMERICAN INSTITUTE OF  
CERTIFIED PUBLIC ACCOUNTANTS

March 12, 2026

Jenifer Van Dyke  
Executive Director of Finance  
Oak Ridge Schools  
304 New York Avenue  
Oak Ridge, TN 37830

Attached to this email is a draft copy of the Contract to Audit Accounts for Oak Ridge Schools for the year ending June 30, 2026. We have initiated the contract from our office. Please access the Tennessee Comptroller, Division of Municipal Audit's **Contract and Reporting System (CARS)** website at <https://apps.cot.tn.gov/CARS/> to apply an electronic signature acceptance by a Schools-designated signer. After the Schools' designated representative approves and applies their electronic signature to the audit contract, the Comptroller's office will approve and sign and then notify each party at the e-mail addresses that are set up in each of their respective accounts. They will direct you to access an on-line copy of the final contract through the CARS system by going to **Manage Audit Contracts** and selecting the **Files** link at the end. Please keep the draft copy and a downloaded and/or printed copy of the final original approved contract for your records.

Also, attached is a standard engagement letter for the audit to be reviewed and signed by you. Return a signed copy to us and retain a copy for your records.

If you have any questions, please let me know. We appreciate the opportunity of being of service to the Schools and we look forward to working with you and your staff.

Very truly yours,

BROWN JAKE & McDANIEL, PC

  
Terry L. Moats, CPA, CGFM, CGMA

Email Attachments

# CONTRACT TO AUDIT ACCOUNTS

OF

## Oak Ridge Board of Education

**FROM July 01, 2025 TO June 30, 2026**

This agreement made this 12th day of March 2026, by and between Brown Jake and McDaniel, PC, 2607 Kingston Pike, Suite 110, Knoxville, TN 37919-3336, hereinafter referred to as the "auditor" and Oak Ridge Board of Education, of 304 New York Avenue, Oak Ridge, TN 37830, hereinafter referred to as the "organization", as follows:

1. In accordance with the requirements of the laws and/or regulations of the State of Tennessee, the auditor shall perform a financial and compliance audit of the organization for the period beginning July 01, 2025, and ending June 30, 2026 with the exceptions listed below: Oak Ridge City Schools - Internal School Funds - 2710 (See Separate Contract)
2. The auditor shall conduct the audit in accordance with *Government Auditing Standards* issued by the Comptroller General of the United States and requirements prescribed by the Comptroller of the Treasury, State of Tennessee, as detailed in the *Audit Manual*. Additional information and procedures necessary to comply with requirements of governments other than the State of Tennessee are permissible provided they do not conflict with or undermine the requirements previously referenced. If applicable, the audit is to be conducted in accordance with the provisions of the Single Audit Act and Title 2 U.S. Code of Federal Regulations Part 200, *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance)*. The audit is also to be conducted in accordance with any other applicable federal agency requirements. It is agreed that this audit will conform to standards, procedures, and reporting requirements established by the Comptroller of the Treasury. It is further agreed that any deviation from these standards and procedures will be approved in writing by the Comptroller of the Treasury prior to the execution of the contract. The interpretation of this contract shall be governed by the above-mentioned publications and the laws of the State of Tennessee.
3. The auditor shall, as part of the written audit report, submit to the organization's management and those charged with governance:
  - a) a report containing an expression of an unmodified or modified opinion on the financial statements, as prescribed by the *Audit Manual*. This report shall state the audit was performed in accordance with *Government Auditing Standards*, except when a disclaimer of opinion is issued. If the organization is a component unit or fund of another entity, it is agreed that: (a) the financial statements may be included in the financial statements of the other entity; (b) the principal auditor for the other entity may rely upon the contracted auditor's report; and (c) any additional information required by the principal auditor of the other entity will be provided in a timely manner.
  - b) a report on the internal control and on compliance with applicable laws and regulations and other matters. This report shall be issued regardless of whether the organization received any federal funding. Audit reports of entities which are subject to the provisions of the Single Audit Act and OMB's Uniform Guidance shall include the additional reports required by that guidance. The reports will set forth findings, recommendations for improvement, concurrence or nonconcurrence of appropriate officials with the audit findings, comments on management's responses as appropriate, and comments on the disposition of prior year findings.
4. If a management letter or any other reports or correspondence relating to other matters involving internal controls or noncompliance are issued in connection with this audit, a copy shall be filed with the Comptroller of the Treasury by the auditor. Such management letters, reports, or correspondence shall be consistent with the findings published in the audit report (i.e., they shall disclose no reportable matters or significant deficiencies not also disclosed in the findings found in the published audit report). The report should also include a corrective action plan for findings developed under OMB's Uniform Guidance and for other findings in accordance with Tennessee Code Annotated § 9-3-407, and the *Audit Manual*. The corrective action plan is only applicable to findings published in the audit report.
5. The auditor shall file **one (1) electronic copy of said report with the Comptroller of the Treasury, State of Tennessee. The auditor shall furnish 10 printed copies and/or an electronic copy of the report to the organization's management and those charged with governance. It is anticipated that the auditor's report shall be filed no later than December 31, 2026, or six (6) months following the period to be audited, whichever is earlier, without explanation to the Comptroller of the Treasury, State of Tennessee, and the organization. (Audit documentation for additional procedures for centralized cafeteria systems contracted with audits of internal school funds must be completed and available for review by September 30 following the fiscal year being audited.)** Requirements for additional copies, including those to be filed with the appropriate officials of granting agencies, are listed below:  
**None**
6. The auditor agrees to retain working papers for no less than five (5) years from the date the report is received by the Comptroller of the Treasury, State of Tennessee. In addition, the auditor agrees that all audit working papers shall, upon request, be made available in the manner requested by the Comptroller for review by the Comptroller of the Treasury or the Comptroller's representatives, agents, and legal counsel, while the audit is in progress and/or subsequent to the completion of the report. Furthermore, at the Comptroller's discretion, it is agreed that the working papers will be reviewed at the office of the auditor, the entity, or the Comptroller and that copies of the working papers can be made by the Comptroller's representatives or may be requested to be made by the firm and may be retained by the Comptroller's representatives.
7. Any reasonable suspicion of fraud, (regardless of materiality) or other unlawful acts including, but not limited to, theft, forgery, credit/debit card fraud, or any other act of unlawful taking, waste, or abuse of, or official misconduct, as defined in Tennessee Code Annotated § 39-16-402, involving public money, property, or services shall, upon discovery, be promptly reported in writing by the auditor to the Comptroller of the Treasury, State of Tennessee, who shall under all circumstances have the authority, at the discretion of the Comptroller, to directly investigate such matters. Notwithstanding anything herein to the contrary, the Comptroller of the Treasury, State of Tennessee, acknowledges that the auditor's responsibility hereunder is to design its audit to obtain reasonable, but not absolute, assurance of detecting fraud that would have a material effect on the financial statements, as well as other illegal acts or violations of provisions of contracts or grant agreements having a direct and material effect on financial statement amounts. If the circumstances disclosed by the audit call for a more detailed investigation by the auditor than necessary under ordinary circumstances, the auditor shall inform the

organization's management and those in charge of governance in writing of the need for such additional investigation and the additional compensation required therefor. Upon approval by the Comptroller of the Treasury, an amendment to this contract may be made by the organization's management, those charged with governance, and the auditor for such additional investigation.

8. **Group Audits.** The provisions of Section 8 relate exclusively to contracts to audit components of a group under AU-C 600. (See definitions in AU-C 600, Paragraph 11.) Section 8 is only applicable to an auditor that audits a component (e.g., a fund, component unit, or other component) **of a county government that is audited by the Division of Local Government Audit (LGA).** Section 8 is intended to satisfy the communication requirements for the group auditor (LGA) to the component auditor under AU-C 600.

- a) The Division of Local Government Audit (LGA) shall be considered the "group auditor" for any contract to audit a component of an applicable county government. LGA shall present the county's financial statements in compliance with U.S. Generally Accepted Accounting Principles (GAAP) as promulgated by the Governmental Accounting Standards Board (GASB). LGA shall conduct the audit in accordance with auditing standards generally accepted in the United States of America and the auditing standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States.
- b) The contracting auditor shall be considered the "component auditor" for purposes of this section.
- c) The financial statements audited by the component auditor should be presented in accordance with GAAP as promulgated by GASB. If the financial reporting framework for any component does not conform to this basis, the financial reporting framework should be disclosed in Section 10 (Special Provisions). (Component financial statements that are not presented using the same financial reporting framework as the county's financial statements may cause this contract to be rejected.)
- d) The component auditor shall conduct the component audit in accordance with auditing standards generally accepted in the United States of America and the auditing standards applicable to financial audits contained in *Government Auditing Standards* issued by the Comptroller General of the United States.
- e) The component auditor shall cooperate with LGA to accomplish the group audit. It is anticipated that LGA will make reference to the component auditor's report in the group audit report. Should LGA find it necessary to assume responsibility for the component auditor's work, the terms, if any, shall be negotiated under a separate addendum to this contract.
- f) The component auditor shall follow the ethical requirements of *Government Auditing Standards* and affirms that the component auditor is independent to perform the audit and will remain independent throughout the course of the component audit engagement.
- g) The component auditor affirms that the component auditor is professionally competent to perform the audit. LGA may confirm certain aspects of the component auditor's competence through the Tennessee State Board of Accountancy.
- h) The component auditor will be contacted via email by the LGA's Audit Review Manager with the estimated date of the conclusion of LGA's audit of the county government. The component auditor agrees to update subsequent events between the date of the component auditor's report and the date of the conclusion of LGA's audit of the county government. Additional subsequent events should be communicated via email to LGA's Audit Review Manager.
- i) The component auditor shall read LGA's audited financial statements for the county government for the previous fiscal year noting in particular **related parties** in the notes to the financial statements, and **material misstatement** findings in the Findings and Questioned Costs Section. The previous year audited financial statements can be obtained from the Comptroller's website at [www.comptroller.tn.gov](http://www.comptroller.tn.gov). As required by generally accepted auditing standards, we have identified Management Override of Controls and Improper Revenue Recognition as presumptive fraud risks. The component auditor shall communicate to LGA (i.e., group management) on a timely basis **related parties** not previously identified by the group management in LGA's prior year audited financial statements. Related parties should be communicated via email to LGA's Audit Review Manager.
- j) The component auditor's report should not be restricted as to use in accordance with AU-C 905.
- k) Sections 1-7 and Sections 10-14 of this contract are also applicable to the component auditor during the performance of the component audit.

9. **Municipal Chart of Accounts Crosswalk.** The provisions of Section 9 relate exclusively to contracts to audit of a municipality, municipality's fund(s), and municipality's school board of education. The auditor shall convert respective municipal audited financial data into a condensed chart of accounts by use of a Microsoft Excel crosswalk tool prescribed by the Comptroller of the Treasury, State of Tennessee, **or** if a respective municipality, municipality's fund(s), or municipality's school board of education chooses to convert their own audited financial data by use of the crosswalk, the auditor shall verify the accuracy of their conversion. The completed condensed chart of accounts crosswalk in Microsoft Excel format shall be filed with the Comptroller of the Treasury, State of Tennessee, by the auditor when the audited financial report is submitted.

10. (Special Provisions) **Additional hourly rate for CARES Act funding grant work.**

11. In consideration of the satisfactory performance of the provisions of this contract, the organization shall pay to the auditor the fee(s) listed below. (Fees may be fixed amounts or estimated.)

**Fixed Contract Fee:**

Audit **\$54,500.00**

Municipal Chart of Accounts Crosswalk **\$1,500.00**

Total Fixed Contract Fee **\$56,000.00**

or

**Estimated Contract Fee:**

Audit

Municipal Chart of Accounts Crosswalk

Total Estimated Contract Fee

(If not a fixed amount, an estimated contract fee should be furnished to the governing unit for budgetary purposes. A schedule of fees and/or rates should be set forth below. Interim billings may be arranged with consent of both parties to this contract.) Provision for the payment of fees under this agreement has been or will be made by appropriation of management and those charged with governance.

**SCHEDULE OF FEES AND/OR RATES:**

**Fixed audit fee (except any work related to CARES Act funding which would be billed at standard hourly rates) plus out-of-pocket costs.**

12. As the authorized representative of the firm, I do hereby affirm that:
- our firm and all individuals participating in the audit are in compliance with all requirements of the Tennessee State Board of Accountancy and;
  - our firm has participated in an external quality control review at least once every three (3) years, conducted by an organization not affiliated with our firm, and that a copy of our most recent external quality control review report has been provided to the organization and the office of the Tennessee Comptroller of the Treasury approving this contract;
  - all members of the staff assigned to this audit have obtained the necessary hours of continuing professional education required by *Government Auditing Standards*;
  - all auditors participating in the engagement are independent under the requirements of the American Institute of Certified Public Accountants and *Government Auditing Standards*.

13. This writing, including any amendments or special provisions, contains all terms of this contract. There are no other agreements between the parties hereto and no other agreements relative hereto shall be enforceable, unless entered into in accordance with the procedures set out herein and approved by the Comptroller of the Treasury, State of Tennessee. In the event of a conflict or inconsistency between this contract and the special provisions contained in paragraph 10 of this contract, the special provision(s) are deemed to be void. Any changes to this contract must be agreed to in writing by the parties hereto and must be approved by the Comptroller of the Treasury, State of Tennessee. All parties agree that the digital signatures, that is, the electronic signatures applied by submitting the contract, are acceptable as provided for in the Uniform Electronic Transaction Act. Any paper documents submitted related to this contract will be converted to an electronic format and such electronic document(s) will be treated as the official document(s).

14. If any term of this contract is declared by a court having jurisdiction to be illegal or unenforceable, the validity of the remaining terms will not be affected, and, if possible, the rights and obligations of the parties are to be construed and enforced as if the contract did not contain that term.

Audit firm

Governmental Unit or Organization

By

By

Signature

Signature

Title/Position:

Title/Position:

E-mail address:

E-mail address:

Date:

Date:

**Approved by the Comptroller of the Treasury, State of Tennessee**

For the Comptroller:

By

Date:

# BROWN JAKE & McDANIEL, PC

CERTIFIED PUBLIC ACCOUNTANTS  
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MEMBERS  
AMERICAN INSTITUTE OF  
CERTIFIED PUBLIC ACCOUNTANTS

March 12, 2026

Jenifer Van Dyke  
Executive Director of Finance  
Oak Ridge Schools  
304 New York Avenue  
Oak Ridge, Tennessee 37830

We are pleased to confirm our understanding of the services we are to provide the Oak Ridge Schools (the Schools) for the year ending June 30, 2026.

## **Audit Scope and Objectives**

We will audit the financial statements of the governmental activities, each major fund, and the aggregate remaining fund information, including the disclosures, which collectively comprise the basic financial statements, of the Schools as of and for the year ending June 30, 2026. Accounting standards generally accepted in the United States of America (GAAP) provide for certain required supplementary information (RSI), such as management's discussion and analysis (MD&A), to supplement the Schools' basic financial statements. Such information, although not a part of the basic financial statements, is required by the Governmental Accounting Standards Board who considers it to be an essential part of financial reporting for placing the basic financial statements in an appropriate operational, economic, or historical context. As part of our engagement, we will apply certain limited procedures to the Schools' RSI in accordance with auditing standards generally accepted in the United States of America (GAAS). These limited procedures will consist of inquiries of management regarding the methods of preparing the information and comparing the information for consistency with management's responses to our inquiries, the basic financial statements, and other knowledge we obtained during our audit of the basic financial statements. We will not express an opinion or provide any assurance on the information because the limited procedures do not provide us with sufficient appropriate evidence to express an opinion or provide any assurance. The following RSI is required by GAAP and will be subjected to certain limited procedures, but will not be audited:

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

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

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

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

In connection with our audit of the basic financial statements, we will read the following other information and consider whether a material inconsistency exists between the other information and the basic financial statements, or the other information otherwise appears to be materially misstated. If, based on the work performed, we conclude that an uncorrected material misstatement of the other information exists, we are required to describe it in our report.

- 1) Introductory Section
- 2) Statistical Section

The objectives of our audit are to obtain reasonable assurance about whether the financial statements as a whole are free from material misstatement, whether due to fraud or error, and issue an auditor's report that includes our opinions about whether your financial statements are fairly presented, in all material respects, in conformity with GAAP, and report on the fairness of the supplementary information referred to in the second paragraph when considered in relation to the financial statements as a whole. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with GAAS and *Government Auditing Standards* will always detect a material misstatement when it exists. Misstatements, including omissions, can arise from fraud or error and are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment of a reasonable user made based on the financial statements. The objectives also include reporting on:

- Internal control over financial reporting and compliance with provisions of laws, regulations, contracts, and award agreements, noncompliance with which could have a material effect on the financial statements in accordance with *Government Auditing Standards*.

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

### **Auditor's Responsibilities for the Audit of the Financial Statements and Single Audit**

We will conduct our audit in accordance with GAAS; the standards for financial audits contained in *Government Auditing Standards*, issued by the Comptroller General of the United States; the Single Audit Act Amendments of 1996; and the provisions of the Uniform Guidance, and will include tests of accounting records, a determination of major program(s) in accordance with Uniform Guidance, and other procedures we consider necessary to enable us to express such opinions. As part of an audit in accordance with GAAS and *Government Auditing Standards*, we exercise professional judgment and maintain professional skepticism throughout the audit.

We will evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management. We will also evaluate the overall presentation of the financial statements, including the disclosures, and determine whether the financial statements represent the underlying transactions and events in a manner that achieves fair presentation. We will plan and perform the audit to obtain reasonable assurance about whether the financial statements are free of material misstatement, whether from (1) errors, (2) fraudulent financial reporting, (3) misappropriation of assets, or (4) violations of laws or governmental regulations that are attributable to the government or to acts by management or employees acting on behalf of the government. Because the determination of waste and abuse is subjective, *Government Auditing Standards* do not expect auditors to perform specific procedures to detect waste or abuse in financial audits nor do they expect auditors to provide reasonable assurance of detecting waste or abuse.

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

We will also conclude, based on the audit evidence obtained, whether there are conditions or events, considered in the aggregate, that raise substantial doubt about the government's ability to continue as a going concern for a reasonable period of time.

Our procedures will include tests of documentary evidence supporting the transactions recorded in the accounts, tests of the physical existence of inventories, and direct confirmation of receivables and certain assets and liabilities by correspondence with selected individuals, funding sources, creditors, and financial institutions. We will also request written representations from your attorneys as part of the engagement.

We have identified the following significant risk(s) of material misstatement as part of our audit planning:

Management override of controls.

Improper revenue recognition

Capital assets are overstated or understated because transactions occurring at the City are not recorded on the school's books.

Debt is not properly stated due to transactions occurring at the City are not recorded on the school's books.

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

Our audit of financial statements does not relieve you of your responsibilities.

### **Audit Procedures—Internal Control**

We will obtain an understanding of the government and its environment, including internal control relevant to the audit, sufficient to identify and assess the risks of material misstatement of the financial statements, whether due to error or fraud, and to design and perform audit procedures responsive to those risks and obtain evidence that is sufficient and appropriate to provide a basis for our opinions. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentation, or the override of internal control. Tests of controls may be performed to test the effectiveness of certain controls that we consider relevant to preventing and detecting errors and fraud that are material to the financial statements and to preventing and detecting misstatements resulting from illegal acts and other noncompliance matters that have a direct and material effect on the financial statements. Our tests, if performed, will be less in scope than would be necessary to render an opinion on internal control and, accordingly, no opinion will be expressed in our report on internal control issued pursuant to *Government Auditing Standards*.

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

An audit is not designed to provide assurance on internal control or to identify significant deficiencies or material weaknesses. Accordingly, we will express no such opinion. However, during the audit, we will communicate to management and those charged with governance internal control related matters that are required to be communicated under AICPA professional standards, *Government Auditing Standards*, and the Uniform Guidance.

### **Audit Procedures—Compliance**

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

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

### **Other Services**

We will also assist in preparing the financial statements, schedule of expenditures of federal and state awards, and related notes of the Schools in conformity with accounting principles generally accepted in the United States of America and the Uniform Guidance based on information provided by you. These nonaudit services do not constitute an audit under *Government Auditing Standards* and such services will not be conducted in accordance with *Government Auditing Standards*. We will also assist in preparing and submitting the State of Tennessee Comptroller's Office Municipal Chart of Accounts Crosswalk. We will perform these services in accordance with applicable professional standards. The other services are limited to the financial statements, schedule of expenditures of federal and state awards, and related notes services previously defined. We, in our sole professional judgment, reserve the right to refuse to perform any procedure or take any action that could be construed as assuming management responsibilities.

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

### **Responsibilities of Management for the Financial Statements and Single Audit**

Our audit will be conducted on the basis that you acknowledge and understand your responsibility for (1) designing, implementing, establishing, and maintaining effective internal controls relevant to the preparation and fair presentation of financial statements that are free from material misstatement, whether due to fraud or error, including internal controls over federal awards, and for evaluating and monitoring ongoing activities to help ensure that appropriate goals and objectives are met; (2) following laws and regulations; (3) ensuring that there is reasonable assurance that government programs are administered in compliance with compliance requirements; and (4) ensuring that management and financial information is reliable and properly reported. Management is also responsible for implementing systems designed to achieve compliance with applicable laws, regulations, contracts, and grant agreements. You are also responsible for the selection and application of accounting principles; for the preparation and fair presentation of the financial statements, schedule of expenditures of federal and state awards, and all accompanying information in conformity with accounting principles generally accepted in the United States of America; and for compliance with applicable laws and regulations (including federal statutes), rules, and the provisions of contracts and grant agreements (including award agreements). Your responsibilities also include identifying significant contractor relationships in which the contractor has responsibility for program compliance and for the accuracy and completeness of that information.

You are also responsible for making drafts of financial statements, schedule of expenditures of federal and state awards, all financial records, and related information available to us and for the accuracy and completeness of that information (including information from outside of the general and subsidiary ledgers). You are also responsible for providing us with (1) access to all information of which you are aware that is relevant to the preparation and fair presentation of the financial statements, such as records, documentation, identification of all related parties and all related-party relationships and transactions, and other matters; (2) access to personnel, accounts, books, records, supporting documentation, and other information as needed to perform an audit under the Uniform Guidance; (3) additional information that we may request for the purpose of the audit; and (4) unrestricted access to persons within the government from whom we determine it necessary to obtain audit evidence. At the conclusion of our audit, we will require certain written representations from you about the financial statements; schedule of expenditures of federal and state awards; federal award programs; compliance with laws, regulations, contracts, and grant agreements; and related matters.

Your responsibilities include adjusting the financial statements to correct material misstatements and confirming to us in the management representation letter that the effects of any uncorrected misstatements aggregated by us

during the current engagement and pertaining to the latest period presented are immaterial, both individually and in the aggregate, to the financial statements of each opinion unit taken as a whole.

You are responsible for the design and implementation of programs and controls to prevent and detect fraud, and for informing us about all known or suspected fraud affecting the government involving (1) management, (2) employees who have significant roles in internal control, and (3) others where the fraud could have a material effect on the financial statements. Your responsibilities include informing us of your knowledge of any allegations of fraud or suspected fraud affecting the government received in communications from employees, former employees, grantors, regulators, or others. In addition, you are responsible for identifying and ensuring that the government complies with applicable laws, regulations, contracts, agreements, and grants. You are also responsible for taking timely and appropriate steps to remedy fraud and noncompliance with provisions of laws, regulations, contracts, and grant agreements that we report. Additionally, as required by the Uniform Guidance, it is management's responsibility to evaluate and monitor noncompliance with federal statutes, regulations, and the terms and conditions of federal awards; take prompt action when instances of noncompliance are identified including noncompliance identified in audit findings; promptly follow up and take corrective action on reported audit findings; and prepare a summary schedule of prior audit findings and a separate corrective action plan. The summary schedule of prior audit findings should be available for our review on July 1, 2026.

You are responsible for identifying all federal awards received and understanding and complying with the compliance requirements and for the preparation of the schedule of expenditures of federal and state awards (including notes and noncash assistance received, and COVID-19-related concepts, such as lost revenues, if applicable) in conformity with the Uniform Guidance. You agree to include our report on the schedule of expenditures of federal and state awards in any document that contains, and indicates that we have reported on, the schedule of expenditures of federal and state awards. You also agree to include the audited financial statements with any presentation of the schedule of expenditures of federal and state awards that includes our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the schedule of expenditures of federal and state awards in accordance with the Uniform Guidance; (2) you believe the schedule of expenditures of federal and state awards, including its form and content, is stated fairly in accordance with the Uniform Guidance; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the schedule of expenditures of federal and state awards.

You are also responsible for the preparation of the other supplementary information, which we have been engaged to report on, in conformity with U.S. generally accepted accounting principles (GAAP). You agree to include our report on the supplementary information in any document that contains, and indicates that we have reported on, the supplementary information. You also agree to include the audited financial statements with any presentation of the supplementary information that includes our report thereon. Your responsibilities include acknowledging to us in the written representation letter that (1) you are responsible for presentation of the supplementary information in accordance with GAAP; (2) you believe the supplementary information, including its form and content, is fairly presented in accordance with GAAP; (3) the methods of measurement or presentation have not changed from those used in the prior period (or, if they have changed, the reasons for such changes); and (4) you have disclosed to us any significant assumptions or interpretations underlying the measurement or presentation of the supplementary information.

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

### **Engagement Administration, Fees, and Other**

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

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

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

The audit documentation for this engagement is the property of Brown Jake & McDaniel, PC and constitutes confidential information. However, subject to applicable laws and regulations, audit documentation and appropriate individuals will be made available upon request and in a timely manner to the Cognizant or Oversight Agency for Audit or its designee, a federal agency providing direct or indirect funding, or the U.S. Government Accountability Office for purposes of a quality review of the audit, to resolve audit findings, or to carry out oversight responsibilities. We will notify you of any such request. If requested, access to such audit documentation will be provided under the supervision of Brown Jake & McDaniel, PC's personnel. Furthermore, upon request, we may provide copies of selected audit documentation to the aforementioned parties. These parties may intend, or decide, to distribute the copies or information contained therein to others, including other governmental agencies.

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

We expect to begin our audit on approximately June 30, 2026 and to issue our reports no later than December 31, 2026. Terry Moats is the engagement partner and is responsible for supervising the engagement and signing the reports or authorizing another individual to sign them. Frank McDaniel will serve as the independent review partner for the audit engagement and he will be responsible for all Firm quality control aspects for the audit engagement.

Our fee for these services will be \$56,000 plus out-of-pocket costs (such as report reproduction, word processing, postage, travel, travel time, copies, telephone, etc.) and additional fees at our standard hourly rates for any non-audit services related to implementation of new GASB Standards/Pronouncements and the related changes to the financial statement presentation, any work related to CARES Act funding and Uniform Guidance work. Our standard hourly rates vary according to the degree of responsibility involved and the experience level of the personnel assigned to your audit. Our invoices for these fees will be rendered each month as work progresses and are payable on presentation. In accordance with our firm policies, work may be suspended if your account becomes 60 days or more overdue and may not be resumed until your account is paid in full. If we elect to terminate our services for nonpayment, our engagement will be deemed to have been completed upon written notification of termination, even if we have not completed our report(s). You will be obligated to compensate us for all time expended and to reimburse us for all out-of-pocket costs through the date of termination. The above fee is based on anticipated cooperation from your personnel and the assumption that unexpected circumstances will not be encountered during the engagement. If significant additional time is necessary, we will keep you informed of any problems we encounter and our fees will be adjusted accordingly.

**Reporting**

We will issue written reports upon completion of our Single Audit. Our reports will be addressed to the Board of Education of Oak Ridge Schools. Circumstances may arise in which our report may differ from its expected form and content based on the results of our audit. Depending on the nature of these circumstances, it may be necessary for us to modify our opinions, add a separate section, or add an emphasis-of-matter or other-matter paragraph to our auditor's report, or if necessary, withdraw from this engagement. If our opinions are other than unmodified, we will discuss the reasons with you in advance. If, for any reason, we are unable to complete the audit or are unable to form or have not formed opinions, we may decline to express opinions or issue reports, or we may withdraw from this engagement.

The *Government Auditing Standards* report on internal control over financial reporting and on compliance and other matters will state that (1) the purpose of the report is solely to describe the scope of testing of internal control and compliance and the results of that testing, and not to provide an opinion on the effectiveness of the entity's internal control or on compliance, and (2) the report is an integral part of an audit performed in accordance with *Government Auditing Standards* in considering the entity's internal control and compliance. The Uniform Guidance report on internal control over compliance will state that the purpose of the report on internal control over compliance is solely to describe the scope of testing of internal control over compliance and the results of that testing based on the requirements of the Uniform Guidance. Both reports will state that the report is not suitable for any other purpose.

*Government Auditing Standards* require that we provide you with a copy of our most recent external peer review report and any letter of comment, and any subsequent peer review reports and letters of comment received during the period of the contract. Our 2024 peer review report accompanies this letter.

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

Very truly yours,

BROWN JAKE & McDANIEL, PC

**RESPONSE:**

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

By: \_\_\_\_\_

Title: \_\_\_\_\_

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



CERTIFIED PUBLIC ACCOUNTANTS

## Report on the Firm's System of Quality Control

November 25, 2024

To The Owners of Brown, Jake & McDaniel, P.C. and the Peer Review Committee of the Tennessee Society of CPAs.

We have reviewed the system of quality control for the accounting and auditing practice of Brown, Jake & McDaniel, P.C. (the firm) in effect for the year ended May 31, 2024. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards). A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System review as described in the standards may be found at [www.aicpa.org/prsummary](http://www.aicpa.org/prsummary). The summary also includes an explanation of how engagements identified as not performed or reported on in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

### Firm's Responsibility

The firm is responsible for designing and complying with a system of quality control to provide the firm with reasonable assurance of performing and reporting in conformity with the requirements of applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported on in conformity with the requirements of applicable professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

### Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of and compliance with the firm's system of quality control based on our review.

### Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including a compliance audit under the Single Audit Act; and an audit of an employee benefit plan;.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

### Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Brown, Jake & McDaniel, P.C. in effect for the year ended May 31, 2024, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)* or *fail*. Brown, Jake & McDaniel, P.C. has received a peer review rating of *pass*.

*Henderson Hutcherson*  
*& McCullough, PLLC*

1200 Market Street, Chattanooga, TN 37402 | T 423.756.7771 | F 423.265.8125

AN INDEPENDENT MEMBER OF THE BDO ALLIANCE USA

February 26, 2025

Joe Brown  
Brown, Jake & McDaniel, P. C.  
2607 Kingston Pike Ste 110  
Knoxville, TN 37919-3336

Dear Joe Brown:

It is my pleasure to notify you that on February 19, 2025, the Tennessee Peer Review Committee accepted the report on the most recent System Review of your firm. The due date for your next review is November 30, 2027. This is the date by which all review documents should be completed and submitted to the administering entity.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Thank you for your cooperation.

Sincerely,



Katie Cheek  
Chief Operating Officer  
kcheek@tscpa.com  
615-377-3825

cc: Randy Dummer, Frank McDaniel

Firm Number: 900010096645

Review Number: 610328

February 26, 2026

Dear Members of the Board,

I request your approval for our district to apply for the TN ALL Corps Tutoring Innovation Grant and the Early Literacy Tutoring Grant offered by the Tennessee Department of Education. These competitive grant opportunities align directly with our district's commitment to accelerating student achievement, strengthening Tier I instruction, and ensuring literacy success for all learners.

The TN ALL Corps Tutoring Innovation Grant is designed to support districts in strengthening and expanding high-quality tutoring for students in grades K-8 (ELA) and/or grades 4-8 (math). This grant requires districts to identify and implement one innovative practice that enhances the quality, coherence, and impact of tutoring while maintaining fidelity to the TN ALL Corps high-dosage, low-ratio tutoring model.

Our proposed focus will center on strengthening instructional coherence and alignment to Tier I instruction. Specifically, we will:

- Develop structures and processes that ensure tutoring intentionally reinforces core classroom instruction.
- Establish a clear instructional coherence theory of action that demonstrates how tutoring supports our district's broader vision for student success.
- Ensure that tutoring accelerates learning toward grade-level expectations while remaining tightly connected to core content.

This approach builds upon our existing high-dosage, low-ratio tutoring framework and ensures that all tutoring efforts remain instructionally aligned and strategically targeted.

Additionally, the Early Literacy Tutoring Grant will strengthen our capacity to provide targeted literacy support for our youngest learners. Through this grant, Local Education Agencies will receive \$500 for each eligible K-2 student assigned a repeating grade code and enrolled in the same grade level for the 2025-26 school year as in 2024-25. These funds will support high-dosage, low-ratio tutoring that accelerates early reading development and addresses foundational literacy needs.

Participation in this grant requires maintaining and submitting key student data at least twice per year. Our district is prepared to meet these reporting requirements and leverage the data to monitor progress, refine instructional practices, and ensure strong outcomes for participating students.

Approval to pursue these grant opportunities will allow our district to:

- Expand access to evidence-based tutoring supports.
- Strengthen alignment between intervention and core instruction.
- Accelerate literacy growth for our most vulnerable early learners.
- Use data-driven decision-making to maximize impact.

Both grants are fully aligned with our strategic priorities and represent a meaningful opportunity to enhance student outcomes while leveraging state resources responsibly and effectively.

Kelly Williams, Ed.D  
Executive Director of Teaching & Learning  
Oak Ridge Schools



## **TN ALL Corps Tutoring Innovation Grant ASSURANCES**

*An authorized Grantee representative must sign below to indicate approval of the contents of the Grantee application and these Assurances for the TN ALL Corps Tutoring Innovation Grant allocation.*

**The undersigned authorized representative accepts the grant award on behalf of the identified LEA ("Grantee"). These Assurances, together with the grant application information and Application Assurances submitted by the Grantee, constitute the "Grant Contract" with the State of Tennessee, Department of Education ("TDOE" or "the State").**

The Grantee hereby agrees to the following Assurances:

1. Administration of the program, activities, and services covered by this Grant Contract shall be in accordance with all applicable state and federal statutes, rules, and regulations and the Grantee's application as approved by the State.
2. The Grantee shall ensure that all tutors providing tutoring complete the Tennessee Accelerating Literacy and Learning Corps ("TN ALL Corps") tutor training.
3. The Grantee shall use Grant funds to implement the tutoring innovation strategy described in the Grantee's application, as approved by the State.
4. The Grantee shall maintain tutor to student ratios of no more than 1:3 in grades K-5 and no more than 1:4 in grades 6-8.
5. The Grantee shall provide tutoring sessions to the same group(s) of students that last between 30 and 45 minutes 2-3 times per week.
6. The Grantee shall provide tutoring to individual students for a full school year with a minimum of twelve (12) weeks per semester. The Grantee shall not exit a student from tutoring mid-year unless they leave the local education agency ("LEA"), public charter school authorized by the Tennessee Public Charter Commission ("Public Charter"), or State Special School ("555").
7. The Grantee shall provide English language arts ("ELA") (grades K-8) and/or Math (grades 4-8) tutoring content that is aligned to grade-level Tier I content from district-adopted high quality instructional materials ("HQIM").
8. The Grantee shall provide tutoring services in ELA, mathematics, or both, for individual students for the full school year, with a minimum of twelve (12) weeks per semester.

9. The Grantee shall establish progress monitoring schedules that consistently track student outcomes and progress in tutoring.
10. The Grantee shall maintain data records for students who complete tutoring and will complete reporting as required and specified by the State at least two (2) times per year.
11. The Grantee shall comply with all applicable requirements of all federal and state laws, statutes, executive orders, regulations, requirements, policies, terms, and conditions governing education.
12. The Grantee shall maintain a proper accounting system in accordance with generally accepted accounting standards and use appropriate fiscal control(s) and procedure(s) to reduce the risk of fraud, waste, and abuse and to account for and ensure proper expenditure of awarded funds. The Grantee shall report any information on suspected fraud, waste, and/or abuse to TDOE and the Tennessee Comptroller of the Treasury pursuant to the "Local Government Instances of Fraud Reporting Act" (Tenn. Code Ann. § 8-4-501 et seq.).
13. The Grantee shall not use awarded funds to acquire equipment (including computer software) in any instance in which such acquisition results in a direct financial benefit to any organization representing the interests of the acquiring entity or the employees of the acquiring entity, or any affiliate of such an organization (Carl D. Perkins Career and Technical Education Act of 2006 ("Perkins V"), Section 122(d)(13)(B) (20 U.S.C. § 2342(d)(13)(B))).
14. The Grantee shall not use awarded funds to lobby or pay any person or organization for the purpose of lobbying, influencing, or attempting to influence an officer or employee of a governmental agency, a Member of Congress or the Tennessee General Assembly, an officer or employee of Congress or the Tennessee General Assembly, or an employee of Member of Congress or the Tennessee General Assembly in connection with the awarding of any contract, grant, loan, cooperative agreement, or the extension, continuation, renewal, amendment, or modification of any contract, grant, loan, or cooperative agreement.
15. The Grantee shall comply with all applicable federal and State statutes relating to civil rights and nondiscrimination, including but not limited to, Title VI of the Civil Rights Act of 1964 (42 U.S.C. § 2000d et seq.), which prohibits discrimination on the basis of race, color, or national origin; Title IX of the Education Amendments of 1972, as amended (20 U.S.C. § 1681 et seq.), which prohibits discrimination on the basis of sex; Section 504 of the Rehabilitation Act of 1973, as amended (29 U.S.C. § 794), which prohibits discrimination on the basis of handicaps; and the Age Discrimination Act of 1975, as amended (42 U.S.C. § 6101 et seq.), which prohibits discrimination on the basis of age.
16. The Grantee shall comply with all applicable federal and State statutes relating to financial and programmatic audits and monitoring and make available all financial and programmatic records and other such documents to authorized representatives, including but not limited to the U.S. Department of Education, the Tennessee Department of Education, and the Tennessee Comptroller of the Treasury, for the purpose of conducting monitoring and audits in

accordance with the Single Audit Act Amendments of 1996 (31 U.S.C. §§ 7501-7506) and 2 C.F.R. § 200.500 et seq., and other federal and Tennessee statutes, as applicable.

17. Required Approvals. The State is not bound by this Grant Contract until it is signed by the parties and approved by appropriate officials in accordance with applicable Tennessee laws and regulations (depending upon the specifics of this Grant Contract, the officials may include, but are not limited to, the Commissioner of Finance and Administration, the Commissioner of Human Resources, and the Comptroller of the Treasury).
18. Modification and Amendment. This Grant Contract may be modified only by a written amendment signed by all parties and approved by the officials who approved the Grant Contract and, depending upon the specifics of the Grant Contract as amended, any additional officials required by Tennessee laws and regulations (the officials may include, but are not limited to, the Commissioner of Finance and Administration, the Commissioner of Human Resources, and the Comptroller of the Treasury).
19. Termination for Convenience. The State may terminate this Grant Contract without cause for any reason. A termination for convenience shall not be a breach of this Grant Contract by the State. The State shall give the Grantee at least thirty (30) days written notice before the effective termination date. The Grantee shall be entitled to compensation for authorized expenditures and satisfactory services completed as of the termination date, but in no event shall the State be liable to the Grantee for compensation for any service that has not been rendered. The final decision as to the amount for which the State is liable shall be determined by the State. The Grantee shall not have any right to any actual general, special, incidental, consequential, or any other damages whatsoever of any description or amount for the State's exercise of its right to terminate for convenience.
20. Termination for Cause. If the Grantee fails to properly perform its obligations under this Grant Contract, or if the Grantee violates any terms of this Grant Contract, the State shall have the right to immediately terminate this Grant Contract and withhold payments in excess of fair compensation for completed services. Notwithstanding the exercise of the State's right to terminate this Grant Contract for cause, the Grantee shall not be relieved of liability to the State for damages sustained by virtue of any breach of this Grant Contract by the Grantee.
21. Subcontracting. The Grantee shall not assign this Grant Contract or enter into a subcontract for any of the services performed under this Grant Contract without obtaining the prior written approval of the State. If such subcontracts are approved by the State, each shall contain, at a minimum, sections of this Grant Contract pertaining to "Conflicts of Interest," "Lobbying," "Nondiscrimination," "PublicAccountability," "Public Notice," and "Records" (as identified by the section headings). Notwithstanding any use of approved subcontractors, the Grantee shall remain responsible for all work performed.
22. Conflicts of Interest. The Grantee warrants that no part of the total Grant Contract Amount 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 Grantee in connection with any work contemplated or performed relative to this Grant Contract.

23. Lobbying. The Grantee certifies, to the best of its knowledge and belief, that:

- a. No federally appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of an agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.
- b. If any funds other than federally appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this contract, grant, loan, or cooperative agreement, the Grantee shall complete and submit Standard Form-LLL, "Disclosure of Lobbying Activities," in accordance with its instructions.
- c. The Grantee shall require that the language of this certification be included in the award documents for all sub-awards at all tiers (including subcontracts, sub-grants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into and is a prerequisite for making or entering into this transaction imposed by 31 U.S.C. § 1352.

24. Communications and Contacts. All instructions, notices, consents, demands, or other communications required or contemplated by this Grant Contract shall be in writing to the State Contract as specified by the State. All instructions, notices, consents, demands, or other communications shall be considered effectively given upon receipt or Grantee confirmation as may be required.
25. Subject to Funds Availability. This Grant 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 Grant Contract upon written notice to the Grantee. The State's right to terminate this Grant Contract due to lack of funds is not a breach of this Grant Contract by the State. Upon receipt of the written notice, the Grantee shall cease all work associated with the Grant Contract. Should such an event occur, the Grantee shall be entitled to compensation for all satisfactory and authorized services completed as of the termination date. Upon such termination, the Grantee shall have no right to recover from the State any actual, general, special, incidental, consequential, or any other damages whatsoever of any description or amount.

26. Nondiscrimination. The Grantee 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 Grant Contractor in the employment practices of the Grantee on the grounds of handicap or disability, age, race, color, religion, sex, national origin, or any other classification protected by federal, Tennessee state constitutional, or statutory law. The Grantee shall, upon request, show proof of nondiscrimination and shall post in conspicuous places, available to all employees and applicants, notices of nondiscrimination.
27. HIPAA Compliance. As applicable, the State and the Grantee shall comply with obligations under the Health Insurance Portability and Accountability Act of 1996 (HIPAA), Health Information Technology for Economic and Clinical Health Act (HITECH) and any other relevant laws and regulations regarding privacy (collectively the "Privacy Rules"). The obligations set forth in this Section shall survive the termination of this Grant Contract.
- a. The Grantee warrants to the State that it is familiar with the requirements of the Privacy Rules and will comply with all applicable HIPAA requirements in the course of this Grant Contract.
  - b. The Grantee warrants that it will cooperate with the State, including cooperation and coordination with State privacy officials and other compliance officers required by the Privacy Rules, in the course of performance of this Grant Contract so that both parties will be in compliance with the Privacy Rules.
  - c. The State and the Grantee will sign documents, including but not limited to business associate agreements, as required by the Privacy Rules and that are reasonably necessary to keep the State and the Grantee in compliance with the Privacy Rules. This provision shall not apply if information received by the State under this Grant Contract is NOT "protected health information" as defined by the Privacy Rules, or if the Privacy Rules permit the State to receive such information without entering into a business associate agreement or signing another such document.
28. Public Accountability. If the Grantee is subject to Tenn. Code Ann. § 8-4-401 *et seq.*, or if this Grant Contract involves the provision of services to citizens by the Grantee on behalf of the State, the Grantee agrees to establish a system through which recipients of services may present grievances about the operation of the service program. The Grantee shall also display in a prominent place, located near the passageway through which the public enters in order to receive Grant supported services, a sign at least eleven inches (11") in height and seventeen inches (17") in width stating:

NOTICE: THIS AGENCY IS A RECIPIENT OF TAXPAYER FUNDING. IF YOU OBSERVE AN AGENCY DIRECTOR OR EMPLOYEE ENGAGING IN ANY ACTIVITY WHICH 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 on the form prescribed by the Comptroller of the Treasury. The State shall obtain copies of the sign from the Comptroller of the Treasury, and upon request from the Grantee, provide Grantee with any necessary signs.

29. Public Notice. All notices, informational pamphlets, press releases, research reports, signs, and similar public notices prepared and released by the Grantee in relation to this Grant Contract shall include the statement, "This project is funded under a grant contract with the State of Tennessee." All notices by the Grantee in relation to this Grant Contract shall be approved by the State.
30. Licensure. The Grantee, its employees, and any approved subcontractor shall be licensed pursuant to all applicable federal, state, and local laws, ordinances, rules, and regulations and shall upon request provide proof of all licenses.
31. Records. The Grantee and any approved subcontractor shall maintain documentation for all charges under this Grant Contract. The books, records, and documents of the Grantee and any approved subcontractor, insofar as they relate to work performed or money received under this Grant Contract, shall be maintained in accordance with applicable Tennessee law. In no case shall the records be maintained for a period of less than five (5) full years from the date of the final payment. The Grantee's records shall be subject to audit at any reasonable time and upon reasonable notice by the State, the Comptroller of the Treasury, or their duly appointed representatives.

The records shall be maintained in accordance with Governmental Accounting Standards Board (GASB) Accounting Standards or the Financial Accounting Standards Board (FASB) Accounting Standards Codification, as applicable, and any related AICPA Industry Audit and Accounting guides.

In addition, documentation of grant applications, budgets, reports, awards, and expenditures will be maintained in accordance with U.S. Office of Management and Budget's *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*.

Grant expenditures shall be made in accordance with local government purchasing policies and procedures and purchasing procedures for local governments authorized under state law.

The Grantee shall also comply with any record keeping and reporting requirements prescribed by the Tennessee Comptroller of the Treasury.

The Grantee shall establish a system of internal controls that utilize the COSO Internal Control - Integrated Framework model as the basic foundation for the internal control system. The Grantee shall incorporate any additional Comptroller of the Treasury directives into its internal control system.

Any other required records or reports which are not contemplated in the above standards shall follow the format designated by the head of the State, the Central Procurement Office, or the Commissioner of Finance and Administration of the State of Tennessee.

32. Monitoring. The Grantee's activities conducted and records maintained pursuant to this Grant Contract shall be subject to monitoring and evaluation by the State, the Comptroller of the Treasury, or their duly appointed representatives.
33. Progress Reports. The Grantee shall submit brief, periodic, progress reports to the State as requested.
34. Annual and Final Reports. The Grantee shall submit, within three (3) months of the conclusion of each year of the Term, an annual report. For grant contracts with a term of less than one (1) year, the Grantee shall submit a final report within three (3) months of the conclusion of the Term. For grant contracts with multiyear terms, the final report will take the place of the annual report for the final year of the Term. The Grantee shall submit annual and final reports to the State. At minimum, annual and final reports shall include: (a) the Grantee's name; (b) the Grant Contract's Edison identification number, Term, and total amount; (c) a narrative section that describes the program's goals, outcomes, successes and setbacks, whether the Grantee used benchmarks or indicators to determine progress, and whether any proposed activities were not completed; and (d) other relevant details requested by the State. Annual and final report documents to be completed by the Grantee shall appear on the State's website or as an attachment to the Grant Contract.
35. Audit Report. The Grantee shall be audited in accordance with applicable Tennessee law.

At least ninety (90) days before the end of its fiscal year, the Grantee shall complete the Information for Audit Purposes ("IAP") form online (accessible through the Edison Supplier portal) to notify the State whether or not Grantee is subject to an audit. The Grantee should submit only one, completed form online during the Grantee's fiscal year. Immediately after the fiscal year has ended, the Grantee shall fill out the End of Fiscal Year ("EOFY") (accessible through the Edison Supplier portal).

When a federal single audit is required, the audit shall be performed in accordance with U.S. Office of Management and Budget's *Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards*.

A copy of the audit report shall be provided to the Comptroller by the licensed, independent public accountant. Audit reports shall be made available to the public.

36. Procurement. If other terms of this Grant Contract allow reimbursement for the cost of goods, materials, supplies, equipment, or contracted services, such procurement shall be made on a competitive basis, including the use of competitive bidding procedures, where practical. The Grantee shall maintain documentation for the basis of each procurement for which reimbursement is paid pursuant to this Grant Contract. In each instance where it is determined that use of a competitive procurement method is not practical, supporting documentation shall include a written justification for the decision and for use of a non-competitive procurement. If the Grantee is a subrecipient, the Grantee shall comply with 2 C.F.R. §§ 200.317-200.327 when

procuring property and services under a federal award.

The Grantee shall obtain prior approval from the State before purchasing any equipment under this Grant Contract.

For purposes of this Grant Contract, the term "equipment" shall include any article of nonexpendable, tangible, personal property having a useful life of more than one year and an acquisition cost which equals or exceeds ten thousand dollars (\$10,000.00).

37. Strict Performance. Failure by any party to this Grant Contract to insist in any one or more cases upon the strict performance of any of the terms, covenants, conditions, or provisions of this Grant Contract is not a waiver or relinquishment of any term, covenant, condition, or provision. No term or condition of this Grant Contract shall be held to be waived, modified, or deleted except by a written amendment signed by the parties.
38. Independent Contractor. The parties shall not act as employees, partners, joint venturers, or associates of one another in the performance of this Grant Contract. The parties acknowledge that they are independent contracting entities and that nothing in this Grant Contract shall be construed to create a principal/agent relationship or to allow either 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 shall not be deemed or construed to be the employees or agents of the other party for any purpose whatsoever.
39. Limitation of State's Liability. The State shall have no liability except as specifically provided in this Grant Contract. In no event will the State be liable to the Grantee or any other party for any lost revenues, lost profits, loss of business, loss of grant funding, decrease in the value of any securities or cash position, time, money, 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 Grant Contract or otherwise. The State's total liability under this Grant Contract (including any exhibits, schedules, amendments or other attachments to the Contract) or otherwise shall under no circumstances exceed the Maximum Liability originally established in Section C.1 of this Grant Contract. This limitation of liability is cumulative and not per incident.
40. 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 Grant Contract. Except as set forth in this Section, any failure or delay by a party in the performance of its obligations under this Grant Contract arising from a Force Majeure Event is not a default under this Grant 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 Grantee's representatives, suppliers, subcontractors, customers or business apart from this Grant Contract is not a Force Majeure Event under this Grant Contract. Grantee 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 one (1) day 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 Grantee's performance longer than forty-eight (48) hours, the State may, upon notice to Grantee: (a) cease payment of the fees until Grantee resumes performance of the affected obligations; or (b) immediately terminate this Grant Contract or any purchase order, in whole or in part, without further payment except for fees then due and payable. Grantee **will** not increase its charges under this Grant Contract or charge the State any fees other than those provided for in this Grant Contract as the result of a Force Majeure Event.

41. Tennessee Department of Revenue Registration. The Grantee 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 Grant Contract.
42. Charges to Service Recipients Prohibited. The Grantee shall not collect any amount in the form of fees or reimbursements from the recipients of any service provided pursuant to this Grant Contract.
43. No Acquisition of Equipment or Motor Vehicles. This Grant Contract does not involve the acquisition and disposition of equipment or motor vehicles acquired with funds provided under this Grant Contract.
44. State and Federal Compliance. The Grantee shall comply with all applicable state and federal laws and regulations in the performance of this Grant Contract. The U.S. Office of Management and Budget's Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards is available here: [http://www.ecfr.gov/cgi-bin/text-idx?SID=c6b2f053952359ba94470ad3a7c1a975&tpl=/ecfrbrowse/Title02/2cfr200\\_main\\_02.tpl](http://www.ecfr.gov/cgi-bin/text-idx?SID=c6b2f053952359ba94470ad3a7c1a975&tpl=/ecfrbrowse/Title02/2cfr200_main_02.tpl)
45. Governing Law. This Grant 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 Grantee agrees that it will be subject to the exclusive jurisdiction of the courts of the State of Tennessee in actions that may arise under this Grant Contract. The Grantee acknowledges and agrees that any rights or claims against the State of Tennessee or its employees hereunder, and any remedies arising there from, shall be subject to and limited to those rights and remedies, if any, available under Tenn. Code Ann. §§ 9-8-101 through 9-8-408.
46. Completeness. This Grant Contract is complete and contains the entire understanding between the parties relating to the subject matter contained herein, including all the terms and conditions agreed to by the parties. This Grant Contract supersedes any and all prior

understandings, representations, negotiations, or agreements between the parties, whether written or oral.

47. Severability. If any terms and conditions of this Grant Contract are held to be invalid or unenforceable as a matter of law, the other terms and conditions shall not be affected and shall remain in full force and effect. To this end, the terms and conditions of this Grant Contract are declared severable.
48. Headings. Section headings are for reference purposes only and shall not be construed as part of this Grant Contract.
49. 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 Grant Contract. The Grantee 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.
50. Debarment and Suspension. The Grantee certifies, to the best of its knowledge and belief, that it, its current and future principals, its current and future subcontractors and their principals:
  - 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 Grant Contract been convicted of, or had a civil judgment rendered against them from commission of fraud, or a criminal offence 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 Grant Contract had one or more public transactions (federal, state, or local) terminated for cause or default.

The Grantee shall provide immediate 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 or disqualified, or presently fall under any of the prohibitions of sections a-d.

51. Confidentiality of Records. Strict standards of confidentiality of records and information shall be maintained in accordance with the requirements of this Grant Contract and applicable state

and federal law. All material, information, and data regardless of form, medium or method of communication, that the Grantee will have access to, acquire, or is provided to the Grantee by the State or acquired by the Grantee on behalf of the State shall be regarded as "Confidential Information." The State grants the Grantee a limited license to use the Confidential Information but only to perform its obligations under the Grant Contract. Nothing in this Section shall permit Grantee to disclose any Confidential Information, regardless of whether it has been disclosed or made available to the Grantee due to intentional or negligent actions or inactions of agents of the State or third parties. Confidential Information shall not be disclosed except as required under state or federal law or otherwise authorized in writing by the State. Grantee shall take all necessary steps to safeguard the confidentiality of such Confidential Information in conformance with the requirements of this Grant Contract and with applicable state and federal law.

As long as the Grantee maintains State Confidential Information, the obligations set forth in this Section shall survive the termination of this Grant Contract.

52. State Sponsored Insurance Plan Enrollment. The Grantee warrants that it will not enroll or permit its employees, officials, or employees of contractors to enroll or participate in a state sponsored health insurance plan through their employment, official, or contractual relationship with Grantee unless Grantee first demonstrates to the satisfaction of the Department of Finance and Administration that it and any contract entity satisfies the definition of a governmental or quasigovernmental entity as defined by federal law applicable to ERISA.
53. Conflicting Terms and Conditions. Should any of these special terms and conditions conflict with any other terms and conditions of this Grant Contract, the special terms and conditions shall be subordinate to the Grant Contract's other terms and conditions.
54. Family Educational Rights and Privacy Act & Tennessee Data Accessibility, Transparency and Accountability Act. The Grantee shall comply with the Family Educational Rights and Privacy Act of 1974 (20 U.S.C. 1232(g)) and its accompanying regulations (34 C.F.R. § 99) ("FERPA"). The Grantee warrants that the Grantee is familiar with FERPA requirements and that it will comply with these requirements in the performance of its duties under this Grant Contract. The Grantee agrees to cooperate with the State, as required by FERPA, in the performance of its duties under this Grant Contract. The Grantee agrees to maintain the confidentiality of all education records and student information. The Grantee shall only use such records and information for the exclusive purpose of performing its duties under this Grant Contract. The obligations set forth in this Section shall survive the termination of this Grant Contract.

The Grantee shall also comply with Tenn. Code Ann. § 49-1-701, et seq., known as the "Data Accessibility, Transparency and Accountability Act," and any accompanying administrative rules or regulations (collectively "DATM"). The Grantee agrees to maintain the confidentiality of all records containing student and de-identified data, as this term is defined in DATAA, in any databases, to which the State has granted the Grantee access, and to only use such data for the exclusive purpose of performing its duties under this Grant Contract.

Any instances of unauthorized disclosure of data containing personally identifiable information in violation of FERPA or DATAA that come to the attention of the Grantee shall be reported to the State within twenty-four (24) hours.

55. **Personally Identifiable Information.** While performing its obligations under this Grant Contract, Grantee may have access to Personally Identifiable Information held by the State ("PII"). For the purposes of this Grant 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"). Grantee agrees it shall not do or omit to do anything which would cause the State to be in breach of any Privacy Laws. Grantee 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 Grantee and in accordance with this Grant 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. Grantee shall immediately notify State: (1) of any disclosure or use of any PII by Grantee or any of its employees, agents and representatives in breach of this Grant Contract; and (2) of any disclosure of any PII to Grantee or its employees, agents and representatives where the purpose of such disclosure is not known to Grantee or its employees, agents and representatives. The State reserves the right to review Grantee's policies and procedures used to maintain the security and confidentiality of PII and Grantee 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 Grantee is in full compliance with its obligations under this Grant Contract in relation to PII. Upon termination or expiration of the Grant Contract or at the State's direction at any time in its sole discretion, whichever is earlier, Grantee shall immediately return to the State any and all PII which it has received under this Grant Contract and shall destroy all records of such PII.

The Grantee shall report to the State any instances of unauthorized access to or potential disclosure of PII in the custody or control of Grantee ("Unauthorized Disclosure") that come to the Grantee's attention. Any such report shall be made by the Grantee within twenty-four (24) hours after the Unauthorized Disclosure has come to the attention of the Grantee. Grantee shall take all necessary measures to halt any further Unauthorized Disclosures. The Grantee, at the sole discretion of the State, shall provide no cost credit monitoring services for individuals whose PII was affected by the Unauthorized Disclosure. The Grantee shall bear the cost of notification to all individuals affected by the Unauthorized Disclosure, 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 Grant Contract or otherwise available at law. The obligations set forth in this Section shall survive the termination of this Grant Contract.

**By my signature below, I hereby agree to the above Assurances and to the content of the grant application submitted on behalf of the Grantee designated below. I understand that this Assurances document does not replace the Application Assurance document and that the Grantee is obligated to the terms outlined in both documents.**

Oak Ridge Schools

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Print Grantee Name

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Signature of Authorized Grantee Representative

Dr. Bruce T. Borchers

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Print Name of Authorized Grantee Representative

Superintendent, ORS Schools

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Print Title of Authorized Grantee Representative

Budget

**Oak Ridge (012) Public District - FY 2026 - TN Tutoring Grant Application - Rev 2 - Early Literacy Tutoring Grant**

<b>Account Number</b>	<b>Total</b>
71100 - Regular Instruction Program	\$10,000.00
72210 - Support Services/Regular Instruction Program	\$0.00
72410 - Office of the Principal	\$0.00
72710 - Transportation	\$0.00
<b>Total</b>	<b>\$10,000.00</b>
<b>Adjusted Allocation</b>	<b>\$10,000.00</b>
<b>Remaining</b>	<b>\$0.00</b>

Budget Detail

**Oak Ridge (012) Public District - FY 2026 - TN Tutoring Grant Application - Rev 2 - Early Literacy Tutoring Grant**

71100 - Regular Instruction Program - \$10,000.00 ▼

**Budget Detail**

**Narrative Description**

**Account Number:** 71100 - Regular Instruction Program

**Line Item Number:** 189 - Other Salaries & Wages

**Focus Area:** Tutor Stipends/Salaries

**School Type:** Traditional Public School

**Optional Program Code:**

**Location Code:** Oak Ridge (012)

**Quantity:** 1.00

**Cost:** \$8,700.00

**Line Item Total:** \$8,700.00

Salaries for 4-6 early literacy tutors (1-2 at each elementary school) providing 1 hour of tutoring three days per week. Early literacy tutors follow the low ratio guidelines from TDOE. Oak Ridge Schools certified tutors are paid \$50 per hour.

**Account Number:** 71100 - Regular Instruction Program

**Line Item Number:** 201 - Social Security

**Focus Area:** Tutor Stipends/Salaries

**School Type:** Traditional Public School

**Optional Program Code:**

**Location Code:** Oak Ridge (012)

**Quantity:** 1.00

**Cost:** \$540.00

**Line Item Total:** \$540.00

Social Security for 4-6 early literacy tutors (1-2 at each elementary school) providing 1 hour of tutoring three days per week. Early literacy tutors follow the low ratio guidelines from TDOE. Oak Ridge Schools certified tutors are paid \$50 per hour.

**Total:**

**Account Number:** 71100 - Regular Instruction Program

**Line Item Number:**

204 - State Retirement

**Focus Area:** Tutor Stipends/Salaries

**School Type:** Traditional Public School

**Optional Program Code:**

**Location Code:** Oak Ridge (012)

**Quantity:** 1.00

**Cost:** \$510.00

**Line Item Total:** \$510.00

State Retirement for 4-6 early literacy tutors (1-2 at each elementary school) providing 1 hour of tutoring three days per week. Early literacy tutors follow the low ratio guidelines from TDOE.  
Oak Ridge Schools certified tutors are paid \$50 per hour.

**Account Number:** 71100 - Regular Instruction Program

**Line Item Number:**

212 - Employer Medicare

**Focus Area:** Tutor Stipends/Salaries

**School Type:** Traditional Public School

**Optional Program Code:**

**Location Code:** Oak Ridge (012)

**Quantity:** 1.00

**Cost:** \$130.00

**Line Item Total:** \$130.00

Medicare for 4-6 early literacy tutors (1-2 at each elementary school) providing 1 hour of tutoring three days per week. Early literacy tutors follow the low ratio guidelines from TDOE.  
Oak Ridge Schools certified tutors are paid \$50 per hour.

**Account Number:** 71100 - Regular Instruction Program

**Line Item Number:**

217 - Retirement - Hybrid Stabilization

Retirement for 4-6 early literacy tutors (1-2 at each elementary school) providing 1 hour of tutoring three days per week. Early literacy tutors follow the low ratio guidelines from TDOE.  
Oak Ridge Schools certified tutors are paid \$50 per hour.

Number:

Focus Area: Tutor Stipends/Salaries

School Type: Traditional Public School

Optional Program Code:

Location Code: Oak Ridge (012)

Quantity: 1.00

Cost: \$120.00

Line Item Total: \$120.00

Total for 71100 - Regular Instruction Program: \$10,000.00

Total for all other Account Numbers: \$0.00

Total for all Account Numbers: \$10,000.00

Adjusted Allocation: \$10,000.00

Remaining: \$0.00

Budget

**Oak Ridge (012) Public District - FY 2026 - TN Tutoring Grant Application - Rev 2 - Tutoring Innovation Grant**

<b>Account Number</b>	<b>Total</b>
71100 - Regular Instruction Program	\$74,600.00
72210 - Support Services/Regular Instruction Program	\$0.00
72410 - Office of the Principal	\$0.00
72710 - Transportation	\$0.00
<b>Total</b>	<b>\$74,600.00</b>
<b>Adjusted Allocation</b>	<b>\$74,600.00</b>
<b>Remaining</b>	<b>\$0.00</b>

Budget Detail

**Oak Ridge (012) Public District - FY 2026 - TN Tutoring Grant Application - Rev 2 - Tutoring Innovation Grant**

71100 - Regular Instruction Program - \$74,600.00 ▼

**Budget Detail**

**Narrative Description**

**Account Number:** 71100 - Regular Instruction Program

**Line Item Number:** 189 - Other Salaries & Wages

**Focus Area:** Tutor Stipends/Salaries

**School Type:** Traditional Public School

**Optional Program Code:**

**Location Code:** Oak Ridge (012)

**Quantity:** 1.00

**Cost:** \$65,100.00

**Line Item Total:** \$65,100.00

Salaries for tutors in the district. Tutoring to follow the low ratio guidelines from TDOE. 36 tutors (5-6 per building - 7 buildings), 3 hours per week up to 36 total hours, \$50 per hour. Spring semester tutors meet from 3:00-4:00 on M, W, F. Some tutors meet from 7:00-8:30 on T, R.

**Account Number:** 71100 - Regular Instruction Program

**Line Item Number:** 201 - Social Security

**Focus Area:** Tutor Stipends/Salaries

**School Type:** Traditional Public School

**Optional Program Code:**

**Location Code:** Oak Ridge (012)

**Quantity:** 1.00

**Cost:** \$4,037.00

**Line Item Total:** \$4,037.00

Social Security payments for tutors.

36 tutors (5-6 per building - 7 buildings), 3 hours per week up to 36 total hours, \$50 per hour. Spring semester tutors meet from 3:00-4:00 on M, W, F. Some tutors meet from 7:00-8:30 on T, R.

**Total:**

**Account Number:** 71100 - Regular Instruction Program

**Line Item Number:**

204 - State Retirement

**Focus Area:** Tutor Stipends/Salaries

**School Type:** Traditional Public School

**Optional Program Code:**

**Location Code:** Oak Ridge (012)

**Quantity:** 1.00

**Cost:** \$3,918.00

**Line Item Total:** \$3,918.00

State retirement payments for tutors.  
36 tutors (5-6 per building - 7 buildings), 3 hours per week up to 36 total hours, \$50 per hour.  
Spring semester tutors meet from 3:00-4:00 on M, W, F. Some tutors meet from 7:00-8:30 on T, R.

**Account Number:** 71100 - Regular Instruction Program

**Line Item Number:**

212 - Employer Medicare

**Focus Area:** Tutor Stipends/Salaries

**School Type:** Traditional Public School

**Optional Program Code:**

**Location Code:** Oak Ridge (012)

**Quantity:** 1.00

**Cost:** \$945.00

**Line Item Total:** \$945.00

Employer Medicare for tutors.  
36 tutors (5-6 per building - 7 buildings), 3 hours per week up to 36 total hours, \$50 per hour.  
Spring semester tutors meet from 3:00-4:00 on M, W, F. Some tutors meet from 7:00-8:30 on T, R.

**Account Number:** 71100 - Regular Instruction Program

**Line Item Number:**

217 - Retirement - Hybrid Stabilization

Retirement for tutors.  
36 tutors (5-6 per building - 7 buildings), 3 hours per week up to 36 total hours, \$50 per hour.

Number: Spring semester tutors meet from 3:00-4:00 on M, W, F. Some tutors meet from 7:00-8:30 on T, R.

Focus Area: Tutor Stipends/Salaries

School Type: Traditional Public School

Optional Program Code:

Location Code: Oak Ridge (012)

Quantity: 1.00

Cost: \$600.00

Line Item Total: \$600.00

Total for 71100 - Regular Instruction Program: \$74,600.00

Total for all other Account Numbers: \$0.00

Total for all Account Numbers: \$74,600.00

Adjusted Allocation: \$74,600.00

Remaining: \$0.00

## Memorandum

Date: March 11, 2026

To: Dr. Borchers

From: Kelly Williams, Executive Director of Teaching & Learning

Subject: Comprehensive Literacy State Development (CLSD) Grant

The state of Tennessee has been awarded \$27.5 million through the federal Comprehensive Literacy State Development (CLSD) grant to support adolescent literacy in 54 Tennessee school districts. Through a competitive application process, districts were able to apply for funding through the Literacy Materials Implementation Grant, which supports the adoption and implementation of high-quality instructional materials and evidence-based literacy practices for students in grades 5–12.

The CLSD program, authorized under Sections 2221–2225 of the Elementary and Secondary Education Act (ESEA), is designed to strengthen comprehensive literacy programs that advance reading and writing from birth through grade 12, with particular emphasis on supporting disadvantaged students, including those living in poverty, English learners, and students with disabilities.

This grant supports statewide efforts to strengthen literacy instruction and improve student outcomes through the use of high-quality materials and evidence-based practices.

Budget

**Oak Ridge (012) Public District - FY 2026 - Literacy Materials Implementation Support Grant - Rev 1 - Literacy Materials Implementation Support Grant**

<b>Account Number</b>	<b>Total</b>
71100 - Regular Instruction Program	\$10,000.00
72210 - Support Services/Regular Instruction Program	\$80,000.00
	<b>Total</b> \$90,000.00
	<b>Adjusted Allocation</b> \$90,000.00
	<b>Remaining</b> \$0.00

Budget Detail

**Oak Ridge (012) Public District - FY 2026 - Literacy Materials Implementation Support Grant - Rev 1 - Literacy Materials Implementation Support Grant**  
 71100 - Regular Instruction Program - \$10,000.00

**Budget Detail**

**Narrative Description**

**Account Number:** 71100 - Regular Instruction Program  
**Line Item Number:** 195 - Certified Substitute Teachers  
**Optional Program Code:**  
**Location Code:** Oak Ridge (012)  
**Quantity:** 1.00  
**Cost:** \$7,430.00  
**Line Item Total:** \$7,430.00

Substitute teachers for Grant-specific professional learning opportunities including:  
 o classroom learning walks,  
 o vendor-facilitated professional learning opportunities, and  
 o professional learning collaboratives.  
 - Intellectual preparation meetings

**Account Number:** 71100 - Regular Instruction Program  
**Line Item Number:** 201 - Social Security  
**Optional Program Code:**  
**Location Code:** Oak Ridge (012)  
**Quantity:** 1.00  
**Cost:** \$462.00  
**Line Item Total:** \$462.00

Social Security for Substitute teachers for Grant-specific professional learning opportunities including:  
 o classroom learning walks,  
 o vendor-facilitated professional learning opportunities, and  
 o professional learning collaboratives.  
 - Intellectual preparation meetings

**Account Number:** 71100 - Regular Instruction Program  
**Line Item Number:** 212 - Employer Medicare  
**Optional Program Code:**

Medicare for Substitute teachers for Grant-specific professional learning opportunities including:  
 o classroom learning walks,  
 o vendor-facilitated professional learning opportunities, and  
 o professional learning collaboratives.  
 - Intellectual preparation meetings

**Code:**

Location Code: Oak Ridge (012)

Quantity: 1.00

Cost: \$108.00

Line Item Total: \$108.00

**Account Number:** 71100 - Regular Instruction Program

**Line Item Number:** 429 - Instructional Supplies & Materials

**Optional Program Code:**

Location Code: Oak Ridge (012)

Quantity: 1.00

Cost: \$2,000.00

Line Item Total: \$2,000.00

Supplemental instructional materials for grades 5-8, which may include but are not limited to iPads, headphones, instructional texts, and other items deemed necessary by the Literacy Coordinator as they relate to this grant funding source.

**Total for 71100 - Regular Instruction Program:** \$10,000.00

**Total for all other Account Numbers:** \$80,000.00

**Total for all Account Numbers:** \$90,000.00

**Adjusted Allocation:** \$90,000.00

**Remaining:** \$0.00

Budget Detail

**Oak Ridge (012) Public District - FY 2026 - Literacy Materials Implementation Support Grant - Rev 1 - Literacy Materials Implementation Support Grant**  
72210 - Support Services/Regular Instruction Program - \$80,000.00 ▼

**Budget Detail**

**Narrative Description**

**Account Number:** 72210 - Support Services/Regular Instruction Program

**Line Item Number:** 399 - Other Contracted Services

**Optional Program Code:**

**Location Code:** Oak Ridge (012)

**Quantity:** 1.00

**Cost:** \$80,000.00

**Line Item Total:** \$80,000.00

Contracted Services with NIET scaling and spreading work started in 2025-2026 grant year. This work will be complete by June 30.

<b>Total for 72210 - Support Services/Regular Instruction Program:</b>	\$80,000.00
<b>Total for all other Account Numbers:</b>	\$10,000.00
<b>Total for all Account Numbers:</b>	\$90,000.00
<b>Adjusted Allocation:</b>	\$90,000.00
<b>Remaining:</b>	\$0.00



# Oak Ridge Schools

PRESCHOOL

## Rationale for Approval Request for Preschool State Micro Grant

I respectfully request approval of an application for a state micro grant for the Preschool in the amount of \$7,500.

If received, the \$7,500 would be used to purchase 3 kits from Creative Curriculum to update the Preschool curriculum being used in our four-year-old classrooms. (See attached quote) The remaining balance would be covered by Head Start funds.

Respectfully,

*Lisa M Downard*

Mrs. Lisa M Downard

Principal

157 Carver Ave | Oak Ridge, TN 37830

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

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

Every student prepared for college, career, and life success



Oak Ridge Schools

PRESCHOOL

**TEACHING STRATEGIES, LLC ("TS")**  
 80 M STREET, SE, SUITE 1010  
 WASHINGTON, DC 20003  
 301-634-0818

**Customer Name:** Oak Ridge Board of Education  
**Customer Number:** 02A8801  
**Contact Name:** Erin Pearson  
**Contact Email:** eepearson@ortn.edu  
**Contact Title:** Education Coordinator

**Prepared by:** Jenn Rheaume  
 jenn.r@teachingstrategies.com  
 (301) 634-0818  
**Expiration Date:** 03-19-2026  
**Subscription Term:** -

SUMMARY			
PRODUCT	SALES PRICE	QTY	TOTAL PRICE
203040 The Creative Curriculum <sup>®</sup> for Pre-K - Print Resources	\$2,625.00	3	\$7,875.00
		Subtotal:	\$7,875.00
		Shipping:	\$867.00
		Tax:	\$0.00
		Total:	\$8,742.00

If paying by credit card a 2.5% processing fee of \$218.55 will be added, which is to cover the cost of processing a credit or charge card transaction, for a Total Price of \$8,960.55. Only Visa, Mastercard, and American Express credit cards may be used. Please do not use debit cards. To avoid the processing fee, payment by ACH or wire is available.

**BILL TO**

**Billing Client:** Oak Ridge Board of Education  
**Billing Street:** PO Box 6588  
**Billing City:** Oak Ridge  
**Billing State:** Tennessee  
**Billing Postal Code:** 37831  
**Billing Country:** United States

**SHIP TO**

**Ship to Org:** Oak Ridge Board of Education  
**Ship to Attn:** Erin Pearson  
**Shipping Address Line 1:** 157 Carver Ave  
**Shipping Address Line 2:**  
**Shipping Address Line 3:**  
**Shipping City:** Oak Ridge  
**Shipping State:** Tennessee  
**Shipping Postal Code:** 37830  
**Shipping Country:** United States  
**Shipping Type:** Standard



# Oak Ridge Schools

Business Office

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

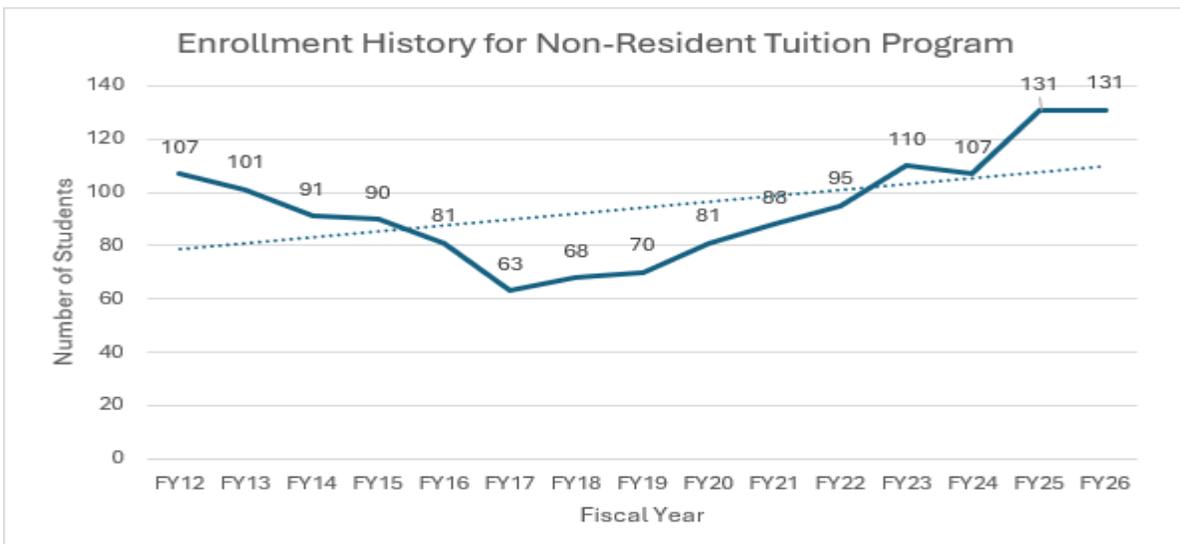
## Memorandum

**To:** Dr. Bruce Borchers, Superintendent  
**From:** Jenifer Van Dyke<sup>JVD</sup>, Executive Director of Finance  
**Date:** March 30, 2026  
**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 2026-27 school year is attached. Non-resident tuition availability for FY27 will be determined by actual enrollment of resident students and capacity at each school.

The Non-Resident Tuition Statistics for 2025-26 School Year are as follows:

- **Total Tuition Students** 131
- **Tuition Revenue** \$350,599.80
- **Percentage by County:** 36% Anderson County; 21% Roane County; 38% Knox County; and 5% Other Tennessee Counties
- **Enrollment by Grade:** 52% Grades 7-12; 48% Grades K-6





## Oak Ridge Schools

### Non-Resident Tuition Rates

### 2026-2027 School Year

		FY 2026	FY 2027
Anderson County Residents	Grades K-12	\$3,722	<b>\$3,761</b>
Roane County Residents	Grades K-12	\$3,722	<b>\$3,761</b>
Other Tennessee County Residents	Grades K-12	\$8,011	<b>\$8,086</b>
Out of State Residents	Grades K-12	\$13,836	<b>\$14,975</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 tax revenues received from Roane and Anderson Counties to the prior year revenues received by the City of Oak Ridge, 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 TISA revenue received by the Oak Ridge Schools is added to the total, prior to dividing by the ADM for the prior year.



# Oak Ridge High School

1450 Oak Ridge Turnpike  
Oak Ridge, Tennessee 37830

## MEMORANDUM

To: Dr. Bruce Borchers  
From: Nicholas Corrigan  
Date: March 16, 2026  
Subject: Yearbook Bid Information

The *Oak Log* is a long-standing tradition at Oak Ridge High School. Capturing the memories of each school year is exciting, challenging, and creates an academic opportunity for students to learn skills in marketing, graphic design, photography, journalism, business, budgeting, time management, and teamwork.

Rachael Pryfogle, a French teacher at ORHS, agreed to assume the responsibilities of the *Oak Log* with no previous yearbook experience this past school year. The desire of the *Oak Log* staff is to ensure we provide our students the best possible training, support and environment.

The yearbook adviser interviewed representatives from Walsworth, Varsity, and Jostens and received bids from a total of four companies. Following the presentations and receipt of the bids, the administrative team as well as Mrs. Pryfogle, have determined Jostens will provide the greatest opportunities - both academically and creatively - to publish an outstanding *Oak Log* for our students and community. The additional conferences, equipment, training for students, training for our *Oak Log* teacher, providing a cover artists, online supports and weekly instructional support by the representative will help meet our goals. Jostens offers these supports at no additional charge. The representative provides excellent instruction and fosters a spirit of student engagement when in the classroom.

It is our recommendation, based on the costs as well as the additional incentives and service promised and provided in the past, we use Jostens as our yearbook vendor for 2026-2027. Their bid of \$53,000.00 was between the lowest of \$45,000.00 and the highest of \$53,885.00. Bids were advertised in accordance with state guidelines.

Nicholas Corrigan  
Principal, ORHS

# Oak Ridge Board of Education

Monitoring:  <b>Review: Annually, in September</b>	Descriptor Term:  <h2 style="text-align: center;">Tobacco-Free Schools</h2>	Descriptor Code: <b>1.803</b>	Issued Date: <u>03/30/26</u> <b>04/22/19</b>
		Rescinds: <b>1.803 / I-54</b>	Issued: <u>04/22/19</u> <u>04/28/14</u> <b>08/25/14</b>

- 1 All uses of tobacco including electronic/battery operated nicotine delivery devices, vapor products, and
- 2 all other associated paraphernalia are prohibited in all of the school district's buildings, on all school
- 3 grounds and in all vehicles that are owned, leased, or operated by the district at all times.<sup>1</sup> Smoking
- 4 and vaping shall be prohibited in any public seating areas including, but not limited to, bleachers used
- 5 for sporting events or public restrooms.<sup>2</sup>
  
- 6 Employees and students in the school district will not be permitted to use these products while they are
- 7 participants in any class or activity in which they represent the school district.
  
- 8 Signs will be posted throughout the district's facilities to notify students, employees, and all other
- 9 persons visiting the school that the use of these products is forbidden. The following notice shall be
- 10 prominently posted (including at each ticket booth) for elementary or secondary school sporting
- 11 events: Smoking is prohibited by law in seating areas and in restrooms.<sup>3</sup>

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Legal References

1. 20 USCA § 6083; TCA 39-17-1604(6); TCA 39-17-1503(9), (10)
2. TCA 39-17-1604(10)
3. TCA 39-17-1605

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Cross References

Community Use of School Facilities 3.206

## Oak Ridge Board of Education

Monitoring: <b>Review: Annually, in October</b>	Descriptor Term: <b>Food Service Management</b>	Descriptor Code: <b>3.500</b>	Issued Date: <del>03/30/26</del> 01/27/20
		Rescinds:	Issued: <del>01/23/17</del> 01/06/14 05/22/02

1 The School Nutrition Program shall be operated on a nonprofit basis and shall comply with all rules and  
2 regulations pertaining to nutrition, health, sanitation, internal accounting procedures, and service of  
3 foods and will meet all state and federal and local requirements necessary for participation.<sup>1</sup>

4 The system's food service supervisor will oversee the program. All products and services necessary for  
5 the operation of the school nutrition department shall be procured using a procurement plan which must  
6 comply with federal and state purchasing procedures.

7 School food service receipts will be used to pay regular food service operating costs. When food service  
8 facilities are used by agencies, an adequate fee will be charged and the manager will ensure that no  
9 USDA foods or supplies provided for the regular program are used.

10 Breakfast, lunch, or snack brought from the home of the student is allowed if the food is for the student's  
11 own consumption. The introduction of any food by a student or parent that will be shared with other  
12 students is not allowed in the cafeteria.

13 School Nutrition may include the following programs: National School Lunch Program, Fresh Fruit and  
14 Vegetable Program, School Breakfast Program, Seamless Summer Option, and Afterschool Snack  
15 Program. Meals and snacks that are offered shall meet the federal requirements for reimbursement as  
16 defined by federal regulations.<sup>2</sup>

17 As required for participation in the School Nutrition Programs, the board agrees to the following:

- 18 1. Meals must be made available to all students in attendance; and
- 19 2. Free and reduced-price meals/snacks must be made available to students who are determined  
20 eligible for these benefits.

21 Procedures for implementing guidelines established by the State Department of Education, School  
22 Nutrition Program are on file in the district food service procedures manual.

23

24 *Free or Reduced Priced Meals*

25

26 The criteria and procedures for determining a student's need and steps in securing for

1 students no-cost or reduced-cost lunches as established at the state/federal level will be  
2 outlined and made known by the Director of Pupil Services.

3  
4 Students who participate in no-cost or reduced-cost meals will not be distinguished in any way  
5 from students who pay the regular price. Their names will not be made known to any person  
6 except such staff member(s) as needed to make the special arrangements for them. (7CFR Part 245,  
7 01/01/2013)

#### 8 9 *Students Requesting Modified Meals*

10 The School Nutrition Program shall make reasonable modifications to accommodate children with  
11 disabilities or specialized diet restrictions. These modifications will be made on a case-by-case basis  
12 when supported by a written statement from a licensed healthcare professional who is authorized to write  
13 prescriptions under state law.

14 The Superintendent or designee shall develop procedures for notifying parents/guardians of the process  
15 for requesting meal modifications, and arrange for an impartial hearing process to resolve grievances  
16 related to requests for modifications based on a disability.

#### 17 18 *Offer vs. Serve*

19  
20 All Breakfast Meal Components must be offered. Students may refuse one (1) of the four (4)  
21 components to qualify as a reimbursable meal. One of the components selected must be a fruit or  
22 vegetable.

23  
24 All Lunch Meal Components must be offered. Students may refuse two (2) of the five (5)  
25 components, however, the student must select a fruit or vegetable component to qualify  
26 as a reimbursable meal. (7CFR Part 210 and 220, 01/01/2013)

#### 27 28 *Serving Competitive Foods During Meal Service Periods*

29  
30 The sale of competitive foods must comply with all local procedures, but at a minimum must be as  
31 stringent as the current state and federal regulations concerning competitive foods.<sup>3</sup>

32  
33 During the meal service periods the competitive food sales in the cafeteria will be  
34 restricted to individual components of the reimbursable meal and items approved by the  
35 Secretary of Agriculture in grades Pre-Kindergarten through Eight (PreK-8). These items may be sold  
36 as separate items during the meal service period at a la carte pricing.

37  
38 For grades Nine through Twelve (9-12), no competitive foods of minimal nutritional value  
39 will be sold in the cafeteria during meal service periods. During the lunch service periods,  
40 the competitive food sales in the cafeteria will be restricted to individual components  
41 of the reimbursable meals and competitive foods approved by the Secretary of Agriculture.

42  
43 The selling of items by anyone other than the school foodservice department is

1 prohibited until after the completion of the last posted lunch period. This would include, but not limited  
2 to the selling of food items or beverages to students utilizing vending machines, school stores,  
3 commercial sources or other fundraising activities. ~~vending machines, school stores, and other~~  
4 ~~fundraising activities. Furthermore, no outside commercial sources are to be permitted in~~  
5 ~~school buildings and/or school premises for the purpose of selling/delivering food items~~  
6 ~~or beverages to students until after the last posted lunch period.~~

7  
8 Vending machines in the schools will be controlled so that they do not offer competition to  
9 the school breakfast and lunch programs to encourage poor eating habits (7 CFR Parts 210 and 220).

### 10 11 *Sanitation*

12  
13 The Food Service Department shall be responsible for implementing regulations from the  
14 Department of Health and seeing that school cafeterias meet acceptable standards of  
15 cleanliness at all times. (TDH Chapter 1200-23-1)

### 16 17 *Charging Meals*

18  
19 In the event a student does not have adequate funds to purchase a meal, he/she will be allowed to charge  
20 the meal. The unpaid meal charge becomes a debt, and repayment will be expected, at the reduced or  
21 regular price, according to the student's Free/Reduced Lunch Status. The school district may engage in  
22 payment collection activities for meal charges that are unpaid.<sup>4</sup>

23  
24 The Superintendent of Schools/designee shall ensure that this policy is provided in writing to all  
25 households at the start of each school year and to households that transfer to the school during the school  
26 year.

### 27 *Collection of Unpaid Meal Charges*

28  
29 Charged meals must be collected or reimbursed to the school nutrition fund by the school  
30 general fund as the state regulation describes: "There must be a reconciliation of the charges. What is  
31 owed must be paid from funds other than those of the School Nutrition Program. Any losses arising  
32 from uncollectible accounts and other claim and related costs are unallowable for the School Nutrition  
33 Program and the school activity funds (TCA 49-1-302)."

34 The district shall make reasonable efforts to collect debts resulting from unpaid meal charges prior to  
35 the end of the school year. Uncollected charges from the previous fiscal year shall be considered  
36 delinquent debt. The Superintendent or designee shall establish reasonable methods and a timeframe for  
37 collection of delinquent debt. Any use of third parties to collect delinquent debt must be approved by the  
38 board. Upon recommendation of the Superintendent or designee, the board may classify the total  
39 delinquent debt, annually as bad debt, which shall be considered uncollectable and categorized as an  
40 operating loss.<sup>4</sup>

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Legal References

1. TCA 49-6-2302, 2303; TRR/MS 0520-01-06-.04
2. 7 CFR § 210.10-.13
3. 7 CFR § 210.11
4. 2 CFR 200.426

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Cross References

Investment Earnings 2.402  
Deposit of Funds 2.500  
Financial Reports and Records 2.701

# Oak Ridge Board of Education

Monitoring: <b>Review: Annually, in May</b>	Descriptor Term: <h2 style="margin: 0;">Student Wellness</h2>	Descriptor Code: <b>6.411</b>	Issued Date: <u>03/30/26</u> <b>08/04/25</b>
		Rescinds:	Issued: <u>08/04/25</u> <del>06/09/25</del> 05/22/23 01/27/20 08/28/17 08/22/16

1 The Board recognizes the value of proper nutrition, physical activity, and other health-conscious  
 2 practices and the impact that such practices have on student academic achievement, health, and well-  
 3 being. In order to provide an environment conducive to overall student wellness, this policy shall be  
 4 followed by all schools in the district.<sup>1</sup>

## 5 **COMMITMENT TO COORDINATED SCHOOL HEALTH**

6 All schools shall implement the Centers of Disease Control and Prevention’s (CDC) Coordinated  
 7 School Health (CSH) approach to managing new and existing wellness related programs and services  
 8 in schools and the surrounding community based on State law and State Board of Education CSH  
 9 standards and guidelines. The district's Coordinated School Health Coordinator shall be responsible for  
 10 overseeing compliance with State Board of Education CSH standards and guidelines in the school  
 11 district.

## 12 **SCHOOL HEALTH ADVISORY COUNCIL<sup>2,3</sup>**

13 A district school health advisory council shall be established to serve as a resource to school sites for  
 14 implementing policies and programs and develop an active working relationship with the county health  
 15 council. The council shall consist of individuals representing the school and community, including  
 16 parents, students, teachers, school administrators, health professionals, school food service  
 17 representatives, and members of the public. The primary responsibilities of the council include but are  
 18 not limited to:

- 19 1. Developing, implementing, monitoring, reviewing and as necessary, making recommendations
- 20 as to physical activity and nutrition policies;
- 21 2. Ensuring all schools within the district create and implement an action plan related to all
- 22 School Health Index modules;
- 23 3. Ensuring that the results of the action plan are annually reported to the council; and
- 24 4. Ensuring that school level results include measures of progress on each indicator of the School
- 25 Health Index.

1 The State Board of Education's Coordinated School Health and Physical Activity Policies shall be used  
2 as guidance by the Council to make recommendations. The Board will consider recommendations of  
3 the Council in making policy changes or revisions.

4 Additionally, each school will have a Healthy School Team consisting of teachers, students, parents  
5 and administrators.<sup>2</sup> The Team shall hold Healthy School Team meetings during the school year to  
6 assess needs and oversee planning and implementation of school health efforts. The  
7 Superintendent/designee will ensure compliance with the school Wellness Policy, to include an  
8 assessment of the implementation of the Wellness Policy and the progress made in attaining the policy  
9 goals. The assessment will be made available to the public.

## 10 **COMMITMENT TO NUTRITION**

11 All schools within the district shall participate in the USDA child nutrition programs, which may  
12 include but not be limited to, the National School Lunch Program, the School Breakfast Program, the  
13 Summer Food Service Program, and the After School Snack Program.<sup>4,5,6</sup>

14 Meals shall be accessible to all students in a non-stigmatizing manner. Students will be given adequate  
15 time to enjoy healthy meals and relax in a pleasant environment. Good nutritional habits shall be  
16 encouraged. All food sold including vending machines, fundraising items, and concessions must meet  
17 guidelines set forth by the Healthy, Hunger-free Kids Act, 2010, Smart Snacks in Schools. In-school  
18 marketing for food and beverage items must only be for items meeting Smart Snacks in Schools  
19 nutrition standards.<sup>4,5,6</sup> The school principal/designee shall be responsible for overseeing their school's  
20 compliance with the State Board of Education Rules and Regulations for sale of food items in their  
21 schools.<sup>2,5,6</sup>

## 22 **DISTRICT GOALS**

23 The district will promote healthy nutrition through various activities, including nutrition related  
24 newsletters, informational links on the district website, healthy eating posters and bulletin boards in  
25 dining areas, and informational booths at various community functions. Nutrition Education will be  
26 offered as part of a standards based program designed to provide students with the knowledge and  
27 skills needed to promote and protect their health as outlined in the State Board of Education  
28 Health Education and Lifetime Wellness Standards. Nutrition education will discourage teachers  
29 from using high fat, sugar, and sodium foods as rewards and encourage students to start each day with  
30 a healthy breakfast. If a district engages in food or beverage marketing, all marketing shall comply  
31 with the Smart Snacks in School nutrition standards.<sup>7</sup>

## 32 **COMMITMENT TO PHYSICAL ACTIVITY AND PHYSICAL EDUCATION**

33 The Board recognizes that physical activity is extremely important to the overall health of a child.  
34 Schools shall support and promote physical activity. Physical activity may be integrated into any areas  
35 of the school program.

36 Physical Education classes shall be offered as part of a standards based program designed to provide  
37 developmentally appropriate moderate to vigorous physical activity as an integral part of the class. All  
38 physical education classes shall comply with the State Board of Education's Physical Education  
39 Standards.

1 Unstructured physical activity periods shall be offered in addition to the school district’s physical  
2 education program. Elementary school students shall receive a minimum of forty (40) minutes of  
3 physical activity each full school day. Middle and high school students shall receive a minimum of  
4 ninety (90) minutes of physical activity each full school week.

5 Physical activity will be conducted outside if weather permits. The following activities shall not be  
6 considered physical activity: walking to and from class, time spent on an electronic device, and time  
7 spent in a physical education class.

8 Schools shall continue to offer after-school sports and activities. Physical activity shall not be  
9 employed as a form of discipline or punishment. In addition, withholding physical activity as a form of  
10 discipline or punishment is prohibited.

### 11 **COMMITMENT TO MENTAL HEALTH AND WELL-BEING**

12 The district is committed to promoting the positive mental health and emotional well-being of all  
13 students.

### 14 **COMMITMENT TO CURRICULUM<sup>3</sup>**

15 All applicable courses of study should be based on State-approved curriculum standards.

### 16 **SCHOOL HEALTH INDEX<sup>3</sup>**

17 All schools within the district shall annually administer a baseline assessment on each of the  
18 recommended School Health Index modules. Results shall be submitted to the School Health Advisory  
19 Council and reported to the State Department of Education.

### 20 **RECORD KEEPING COMPLIANCE**

21 The district’s Coordinated School Health Coordinator shall ensure that records demonstrating  
22 compliance with community involvement requirements are maintained. The Coordinated School  
23 Health Coordinator shall additionally document that the school wellness policy and triennial  
24 assessments are made available to the public.<sup>9</sup>

25

26

27

28

29

30

## Legal References

1. TCA 49-1-1002
2. State Board of Education Policy 4.204
3. State Board of Education Policy 4.206
4. 42 U.S.C.A § 1758b; TRR/MS 0520-01-06-.04
5. TRR/MS 0520-01-06
6. 7 C.F.R. § 210 and 220
7. 7 C.F.R.210.31( c)(3)(iii)
8. TCA 49-6-1021; Public Acts of 2025, Chapter No. 306
9. 7 C.F.R. § 210.31(f)

## Cross References

Student Suicide Prevention 6.415



**Dr. Bruce Borchers, Superintendent**  
**OAK RIDGE SCHOOLS**  
304 New York Avenue  
Oak Ridge, TN 37830

## **RESOLUTION**

A RESOLUTION AUTHORIZING THE SCHOOL SUPERINTENDENT OR THE SUPERINTENDENT'S DESIGNEE, TO PURSUE AND NEGOTIATE PARTNERSHIPS WITH ANDERSON COUNTY BOARD OF EDUCATION AND THE ROANE COUNTY BOARD OF EDUCATION AND OTHER POTENTIAL REGIONAL STATEKHOOLDERS INCLUDING THE ANDERSON COUNTY GOVERNMENT, THE OAK RIDGE CITY GOVERNMENT, THE ROANE COUNTY GOVERNMENT AND OTHER EDUCATIONAL ENTITIES FOR THE PURPOSE OF ESTABLISHING A REGIONAL COLLABORATIVE APPROACH TO EDUCATIONAL INITIATIVES FOCUSED ON FUTURE WORKFORCE READINESS.

**WHEREAS**, a skilled and trained workforce is essential to meet the current and future demands of industries in the region, and the projected need for new graduates as well as up-skilled and re-skilled individuals cannot be met with existing academic programs and resources; and

**WHEREAS**, companies within the nuclear industry and other advanced sectors have expressed increasing interest in locating facilities and operations on or near the Oak Ridge Reservation due to opportunities and advantages afforded by the presence and plans of the Oak Ridge National Laboratory (ORNL), Y-12 National Security Complex, and the Tennessee Valley Authority (TVA); Oak Ridge Associated Universities (ORAU), and

**WHEREAS**, the City of Oak Ridge, Anderson County, and Roane County share the opportunities and challenges of the Oak Ridge Reservation including its property, its federal missions, its legacy needs, and its multi-jurisdictional management organization; and

**WHEREAS**, the school boards and districts of Oak Ridge, Anderson County, and Roane County play a critical role and share the opportunities and challenges of the preparation of a future-ready workforce; and

**WHEREAS**, regional alignment among all stakeholders, including educational institutions, government entities, and industry leaders, is cited by the Tennessee Department of Economic and Community Development (TDEC) as a leading factor in attracting new companies, creating jobs, and fostering sustainable economic growth. The regional educational ecosystem requires nuclear career awareness, robust educational pipeline development, appropriate and available financial resources, and collaboration to optimize academic resources. That level of alignment is necessary across the regional educational ecosystem to provide the necessary skilled and work-ready workforce; and

**WHEREAS**, the City of Oak Ridge, Anderson County, and Roane County have entered partnerships to collaborate, communicate, and plan together for the development of shared areas

of interest, and the school boards and districts in these jurisdictions seek to establish similar collaborative efforts to strengthen educational initiatives and workforce development; and

**WHEREAS**, the school boards and districts of Oak Ridge, Anderson County, and Roane County desire to collaborate, communicate, and plan together for the development of their shared areas of interest in the following ways: (1) Evaluate existing educational plans, including curriculum, facilities, equipment, and personnel, to identify opportunities for alignment and develop a comprehensive regional master education plan that optimizes resources and benefits the region; (2) Pursue mutually beneficial educational initiatives aimed at workforce development and establish partnerships to support the labor needs of current and future industries; (3) Create an adaptive framework and resources to continually evaluate and respond effectively and efficiently to workforce needs with deployable programs across the region; (4) Invite additional regional stakeholders, including higher education institutions and industry leaders, to join this collaborative effort and align efforts around shared goals that benefit the entire region; and (5) Establish regular channels of communication and information sharing among all parties committed to this partnership to ensure transparency and sustained collaboration.

**NOW, THEREFORE, BE IT RESOLVED BY THE OAK RIDGE BOARD OF EDUCATION:**

That the Superintendent, or the Superintendent’s designated proxy, is hereby authorized to pursue and negotiate partnerships with the School Boards of Anderson and Roane Counties, and other potential regional stakeholders, in support of the Oak Ridge Board of Education and the Oak Ridge School System’s collaboration with the Boards of Education and School Systems of Anderson and Roane Counties for the purpose of aligning efforts to prepare a future-ready workforce for the region.

**BE IT FURTHER RESOLVED** that the Superintendent and/or the Superintendent’s designee are hereby authorized to execute the appropriate legal instruments to accomplish the same.

X  
\_\_\_\_\_  
LAURA MCLEAN 3/30/26  
CHAIR, ORS Board of Education

X  
\_\_\_\_\_  
ERIN WEBB 3/30/26  
CO-CHAIR, ORS Board of Education

X  
\_\_\_\_\_  
HEATHER HARTMAN 3/30/26  
MEMBER, ORS Board of Education

X  
\_\_\_\_\_  
MARY CRANK 3/30/26  
MEMBER, ORS Board of Education

X  
\_\_\_\_\_  
ASHLEY CRAVEN 3/30/26  
MEMBER, ORS Board of Education

X  
\_\_\_\_\_  
DR. BRUCE T. BORCHERS 3/30/26  
SUPERINTENDENT, OAK RIDGE SCHOOLS



# Oak Ridge

SCHOOLS

Maintenance and Operations

OFFICE OF MAINTENANCE AND OPERATIONS

**DATE: March 12, 2026**

**TO: Jen Laurendine, Executive Director of School Leadership**

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

**SUBJECT: Purchase of Maintenance Vehicle**

Ms. Laurendine,

I recommend that the Oak Ridge Schools Board of Education approve the purchase of a replacement service truck for the Maintenance Grounds Crew from Ray Viles Ford of Clinton, TN, in the amount of **\$78,448.31**. This vehicle will replace the primary service truck, which has been in operation since 2010 and has surpassed its recommended service life by six years. The current truck is experiencing increasing mechanical issues and remains essential to supporting our district's facility maintenance needs.

The bid process was conducted in accordance with state guidelines, and three vendors submitted proposals. Funding for this purchase will be provided through **72620-718 Motor Vehicles**.

Thank you for your consideration,

Allen Thacker

Director of Maintenance and Operations

***Maintenance Office***

100 Woodbury, Oak Ridge, TN 37830

(865) 425-3171

www.ortn.edu



Ray Verner



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

### Request for Proposal

**Description of items/services requested:**

The Oak Ridge Schools Board of Education is soliciting proposals for service trucks for our Maintenance Department (RFP 26-003) **2026 Fleet Trucks for Maintenance.**

**General Requirements:**

Proposals, bids, or responses will be accepted by the Oak Ridge Schools Business Department no later than **2:00 PM EDT, March 11, 2026.** Every document must be enclosed in an envelope clearly marked as a bid document. Two full copies of the proposal must be submitted each with original signatures on both Bid Forms (included in this packet). Any response, bid, or proposal received after the above deadline shall be considered late, and will not be opened or considered. Bid prices must be valid for no less than sixty (60) days from the date of the bid.

All documents shall be submitted to the following address:

Mary Ann Riley, Purchasing Specialist  
Re: Fleet Trucks for Maintenance  
(RFP 26-003)  
Oak Ridge Schools  
304 New York Ave  
Oak Ridge, TN 37830

KG091  
WSL  
4100-34085T  
WSH  
1200-34081T

BLACK  
APPEARANCE  
PKG

**SPECIFICATIONS:**

**Oak Ridge Schools is looking to purchase two separate trucks which will be clearly stated. You may bid on both or only one.**

**The vehicle bid specifications are based on Ford specifications. Equivalents will be considered.**

## Item 1:

### 2026 4x4 Gas Crew Cab Pickup Truck with Tow Package

(Ford F-150 XLT or Equal)

- Model Year: **2026**
- Make/Model: **Ford F-150 XLT Crew Cab 4x4**, or equivalent model meeting or exceeding all listed specifications *w 3L*
- Color: **White** (factory OEM white paint) *302A*
- **Gasoline engine** required ✓
- Minimum **V6 gasoline engine** (Ford 2.7L EcoBoost or larger OR equivalent "or equal") *99P*
- Minimum **300 horsepower** and **350 lb-ft torque** ✓
- OEM heavy-duty cooling system recommended ✓
- **Automatic transmission**, minimum 10-speed (or current OEM equivalent) ✓
- **Selectable drive modes** including tow/haul mode ✓
- **4-Wheel Drive (4x4)** with electronic shift-on-the-fly ✓
- Standard or upgraded **off-road capable suspension** *SSA*
  
- Power steering ✓
- Four-wheel power disc brakes with ABS ✓
- All-terrain or highway-rated tires, load-rated for vehicle's GVWR ✓
- Full-size spare tire and wheel ✓
- **Crew Cab (4 full doors)** with seating for **5 or 6** passengers
- Cloth or heavy-duty vinyl seats
- Vinyl floor *166*
- Air conditioning and heater/defroster ✓
- **Power windows and door locks** ✓
- **Remote keyless entry** ✓
- **Backup camera**, integrated with infotainment screen ✓
- Factory infotainment system with: ✓
  - AM/FM
  - Bluetooth hands-free
  - Rear-camera display
- Tilt/~~telescoping~~ steering wheel ✓
- 12V outlet(s) and USB/USB-C ports ✓
- Factory floor mats *ADD*
- Electronic Stability Control (ESC) ✓
- Traction Control ✓
- Airbags: front, side, and curtain as OEM standard ✓

- Tire Pressure Monitoring System (TPMS) ✓
- Rearview camera ✓
- Daytime running lamps 942
- OEM Factory Tow Package, including at minimum:
  - Class IV or better hitch receiver ✓
  - 7-pin trailer wiring connector (and 4-pin if OEM provides) ✓
  - Integrated trailer brake controller 67T
  - Trailer sway control ✓
  - Transmission and engine cooling appropriate for towing ✓
  - Tow/haul drive mode ✓
- Vendor must provide OEM tow rating documentation for the offered configuration
- Factory white paint YZ
- Black appearance package acceptable ?
- LED, halogen, or OEM standard headlights ✓
- Factory-installed bed lighting 68L
- Standard 5.5-ft bed 145
- Spray-in bedliner 96W
- OEM 12V power system ✓
- All auxiliary equipment professionally fused and wired ✓
- Upfitter switches N/A on F150
- Full OEM warranty package, not less than:
  - 3-year/36,000-mile bumper-to-bumper ✓
  - 5-year/60,000-mile powertrain ✓
  - 5-year roadside assistance (or current OEM standard) ✓
- Vehicle must arrive fully operational, cleaned, with minimum ¼ tank of fuel ✓
- Include:
  - Window sticker ✓
  - Manufacturer's certificates ✓
  - Owner's manuals ✓
  - Two (2) key fobs ✓
  - Warranty documentation ✓

**Submission Requirements:**

1. A detailed bid form, which includes quantity and unit cost must be included in the bid package. Please include specification sheets on all products/terms.
2. Two full copies of the proposal must be submitted, with original Bid Forms included with each copy.
3. A detailed description of all warranties and support for equipment and software must be included.
4. A copy of your W-9 should be included with bid documents.
5. Any questions should be directed to Mary Ann Riley via email: [orspurchasing@ortn.edu](mailto:orspurchasing@ortn.edu)

**Schedule**

1. Sealed bids will be opened at the School Administration Building, 304 New York Avenue, Oak Ridge, TN 37830 at **2:00pm, March 11, 2026.**

## Bidding Procedures

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

Mary Ann Riley,  
Purchasing Specialist  
2026 Fleet Trucks  
(RFP 26-003)  
304 New York Ave.  
Oak Ridge, TN 37830

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**Bid Form**

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

Project: **2026 Fleet Trucks**  
**RFP 26-003**

Bid Opening: **2:00 PM EDT, March 11, 2026**

Company Name: RAY VARNER

Address: 2026 N. CHARLES G. SEIVERS  
CLINTON, TN 37716

Phone Number: 865 457-0704

Email: RVARNER@RAYVARNER FORD.COM

Main Bid: *This Price is to be for the complete package including delivery. ALL COSTS ARE TO BE INCLUDED IN THE FINAL PRICE.*

Bid Amount Item 1: \$ 52,697 USD

Bid Amount Item 2: \$ 78,448.31 USD

**\*\* You may bid on either one or both specified trucks. \*\***

Purchase subject to funding. ORS reserves the right to purchase either one or both.

Company: RAY VARNER FORD

Signature: Ray Varner

Title: GM

Date: 3-9-26

Please attach detailed specifications.

**HOLD HARMLESS AGREEMENT**

This Hold Harmless Agreement is between Ray Varner Ford LLC  
Name of Contractor

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

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

Name of Contractor: Ray Varner Ford LLC

By: Ray Varner

Title: GM

STATE OF TN  
County of Anderson

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

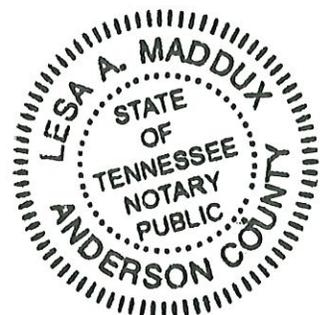
Ray Varner Ford LLC

Ray Varner  
Signature

Witness by hand and Notaries seal at office this 9<sup>th</sup> day of March,  
year of 2026.

Lesla Maddux  
Notary Public

My Commission Expires: 4-24-28



**NON-COLLUSION AFFIDAVIT**

NON-COLLUSION AFFIDAVIT TO BE EXECUTED  
BY DESIGN-BUILDER

State of TN

County of Anderson

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

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

of March, 2026

Ray Varner  
Signature of Officer

Lesla Maddux  
Notary Signature

Ray Varner  
Typed Name of Officer

gm  
Office



4-24-28

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

**IRAN DIVESTMENT ACT REQUIREMENTS**

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

**CERTIFICATION**

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

 _____ Signature	<u>3-9-26</u> Date
<u>RAY VARNER</u> Printed Name	<u>GM</u> Title
<u>RAY VARNER FORD</u> Name of Firm/Company	

\*[https://tn.gov/assets/entities/generalservices/cpo/attachments/List\\_of\\_persons\\_pursuant\\_to\\_Tenn\\_Code\\_Annotation\\_12-12-106\\_Iran\\_Divestment\\_Act-July.pdf](https://tn.gov/assets/entities/generalservices/cpo/attachments/List_of_persons_pursuant_to_Tenn_Code_Annotation_12-12-106_Iran_Divestment_Act-July.pdf)

Item 2:

**2026 4x4 Gas Crew Cab Service Truck with Service Body, Keyless Locking & Inverter**

(Ford F-350 XL or equal)

- **Make/Model/Year:** 2026 Ford F-350 XL Super Duty Crew Cab 4x4,
  - **Dual Rear Wheel (DRW)**, minimum GVWR 11,500 lb *REQUIRES DRW*
- **Wheelbase:** Appropriate for selected service body (typically 160–176 in). Vendor to match *179* wheelbase to body; no frame stretching unless pre-approved. ✓
- **Color:** Oxford White (or OEM standard white). *YZ*
- **Engine:** OEM gasoline V8, minimum ~~6.8L~~ *7.3* displacement (or current OEM gasoline V8 for 2026 *7.3* MY) producing no less than 300 hp and 400 lb-ft torque.
- **Fuel System:** Unleaded gasoline, minimum 34-gal tank (larger/twin tanks acceptable). ✓
- **Transmission:** OEM 10-speed automatic (or current OEM heavy-duty automatic) with ✓ tow/haul mode. ✓
- **Cooling:** Heavy-duty engine and transmission cooling, suitable for towing per Section 2.6. ✓
- **Emissions:** Compliant with all applicable EPA and state emissions requirements at delivery ✓ location.
- **Drive:** 4x4 (4WD) with electronic or manual shift-on-the-fly transfer case; low range ✓ required.
- **Axles:** Heavy-duty front & rear axles sized to GVWR; limited-slip or locking rear differential. *X4L*
- **Suspension:** Heavy-duty springs and shocks appropriate to GVWR and body. ✓
- **Brakes:** 4-wheel power disc brakes with ABS. ✓
- **Steering:** Power steering. ✓
- **Tires/Wheels:** All-terrain or all-season tires, speed/load rated to GVWR; full-size spare tire and wheel. *61J, S12, TBM*
- **Seating:** Crew cab (4 full doors), seating for 5-~~6~~ *6*; heavy-duty vinyl seats (easy-clean).
- **Flooring:** Vinyl/rubber easy-clean floor. ✓
- **Climate:** Air conditioning and heater/defroster. ✓
- **Infotainment:** OEM AM/FM with Bluetooth® hands-free, backup camera display. *872*
- **Power Group:** Power windows, power locks, remote keyless entry, ✓
- **Lighting:** Dome/map lights; exterior cargo lamp.
- **Upfitter Switches:** Minimum ~~4~~ *6* factory upfitter switches (or equivalent fused switch provisions).
- Backup camera (integrated). *872*
- Trailer brake controller (integrated). *52B*
- Electronic Stability Control and Traction Control. ✓

- Tire Pressure Monitoring System (TPMS). ✓
- Airbags per OEM standard. ✓
- Daytime running lamps. ✓
  
- **Factory OEM towing package** required, sized to engine/axle ratio.
- **Receiver Hitch:** Class IV (SRW) or Class V (DRW/heavy spec) with **2.5" receiver** and **2" reducer**.
- **Trailer Wiring:** 7-pin RV blade and 4-pin flat connectors.
- **Trailer Brake:** Integrated trailer brake controller. **52B**
- **Tow/Haul Mode** and transmission/oil coolers.
- **Minimum Conventional Tow Rating:** Provide OEM rating sheet for the offered configuration (must meet or exceed **12,000 lb** conventional for SRW; **15,000 lb** for DRW; or current OEM rating if higher).
- **Rear Camera/Aim:** Backup camera must remain functional post-upfit.
  
- **On-Board Inverter: 120V AC pure sine wave inverter** suitable for charging cordless/battery-powered tools.
  - **Continuous Output:** ≥ 1,000 W continuous (1.5–2.0 kW preferred).
  - **Peak Output:** ≥ 2,000 W.
  - **Outlets:** Minimum **(2) GFCI-protected 120V receptacles** mounted in a weather-protected location on the service body, plus **(1) interior 120V outlet** in a curb-side compartment.
  - **Protection:** GFCI, overload, short-circuit, and low-voltage cut-off.
  - **Integration:** Properly fused connection to vehicle electrical system with dedicated battery protection; labeled disconnect switch; comply with **NEC** best practices for vehicle upfits.
  - **Charging Use Case:** Vendor must certify suitability for charging typical 18–60V lithium-ion tool batteries and chargers (Milwaukee/DeWalt/Makita or similar).
  - **Optional (alternate add):** 12V-to-120V inverter with **idle-up** integration and/or **secondary AGM/Deep-cycle auxiliary battery** with automatic charge relay. Provide add/alt pricing.
  
- **Type: 8'–9' utility/service body** compatible with crew cab wheelbase and selected GVWR; body must not exceed axle ratings or compromise OEM ratings.
- **Construction:** Heavy-gauge steel (or aluminum "or equal"), fully seam-welded; reinforced floor; corrosion-resistant primer and **white** topcoat matched to cab.
- **Compartments:**
  - **Both sides:** minimum **3 vertical compartments per side** (front tall, middle, rear) plus full-width tailgate/work surface.
  - **Shelving:** Adjustable shelves with dividers in all vertical compartments.
  - **Top Lids (optional):** Flip-top bins or open top with removable trays on request—vendor to confirm.
  - **Rear Work Surface:** Slam-action tailgate or equivalent; anti-skid surface.

- **Lighting & Compliance:** LED marker, stop/turn/tail; backup lights; DOT/SAE compliant; reflectors as required.
- **Bumper:** Heavy-duty step bumper compatible with tow receiver; anti-skid surface.
- **Bed/Deck:** Non-skid treadplate or spray-in liner on cargo floor and bumper steps.
- **Tie-downs:** Minimum 4 tie-downs in cargo area.
- **Ladder/Material Racks:**
  - Include removable or fixed **over-cab ladder/material rack**, 1,000 lb minimum distributed capacity.
  - Tie-down rings and front stop.
  - Rack must not interfere with cab roof antenna or third brake light camera view.
- **Compartment Lighting:** LED strip or puck lighting in all compartments, switched with door activation where feasible.
- **Weatherproofing:** Automotive bulb or D-bulb seals, drip rails, stainless hinges, and latches.
- **System: Centralized, keyless power locking** on all service body compartment doors, integrated with the truck's **remote key fob** where feasible.
- **Controls:** Lock/unlock via OEM remote and an **external master keypad** or **master switch** on the body.
- **Indicators:** Visual/audible confirmation (e.g., flash or chirp) acceptable if compliant with local ordinances.
- **Security:** Stainless steel paddle latches or equivalent; shielded linkages; all cylinders keyed alike; provide **(3) keys** and remote fobs.
- **Fail-Safe:** Manual key override for all doors.
- Use **factory upfitter switches** where possible; otherwise provide labeled, fused switch bank in cab.
- All added circuits **fused/breakered**, loomed, and supported; wiring diagrams to be provided at delivery.
- **Battery Protection:** Low-voltage cutoffs or auxiliary battery recommended for inverter loads.
- **Grounding:** Star-ground or OEM-approved grounding; no paint-through grounds.
- **Tow Hooks:** Front tow hooks.
- **Mudflaps:** Behind rear wheels.
- **Fire Extinguisher & First Aid Kit:** 2.5 lb ABC fire extinguisher w/ bracket; basic ANSI first aid kit mounted in cab.
- **Triangle Kit:** DOT reflective triangle kit.
- **Floor Mats:** Heavy-duty front/rear mats. *ADD*
- **Owner's Docs:** Operator manuals for truck, service body, inverter, and locking system.
- Vendor must state **GVWR, GAWR (front/rear)**, curb weight (post-upfit), and **payload**.
- Vendor must state **conventional** and **weight-distributing** tow ratings for the exact configuration.

*GVWR - 14000 lbs  
FRONT - 7000  
REAR - 14,760*

- Service body weight and center-of-gravity must not exceed OEM limits; documentation required.
- **Cab:** OEM e-coat and paint.
- **Body:** Zinc-rich primer and two-component urethane topcoat **white** to match cab (or OEM white powder coat).
- **Hardware:** Stainless steel hinges/fasteners where exposed; cavity wax/rustproofing in seams.
- **Warranty:** Minimum **5-year perforation** on body (or manufacturer standard if longer).
- **FMVSS, SAE, DOT** lighting compliance.
- **OSHA** considerations for safe access and egress.
- Electrical work per **NFPA/NEC** best practices for vehicle upfits.
- **EPA/state emissions** compliance at delivery.
- **Title/Registration:** Must be eligible for titling/registration in **Tennessee** at delivery. Provide MSO and all documentation.
- **Chassis:** OEM **3 yr/36,000 mi** bumper-to-bumper (or current), **5 yr/60,000 mi** powertrain (or current), **5 yr/60,000 mi** roadside assistance (or current). If different for 2026 MY, vendor to state current coverage.
- **Service Body:** Minimum **3 years** structural warranty.
- **Electrical/Locking/Inverter:** Minimum **2 years** parts & labor.
- **Corrosion:** Per Section 4.
- **Local Service:** Identify nearest authorized service centers for chassis and body.
- **Delivery:** Units must arrive **ready for service**, fueled ( $\geq \frac{1}{4}$  tank), clean, and meeting all specs.
- **Pre-Delivery Inspection (PDI):** Completed; include PDI checklist.
- **Training:** On-site orientation (if needed) covering 4x4 system, towing, inverter operation, and keyless locking.
- **Documentation:** Build sheets, certification labels, wiring diagrams, manuals, spare keys/fobs, warranty contacts.
- Vendors must attach a **line-by-line** exceptions table for any deviations and provide **manufacturer cut sheets** for chassis, service body, lock system, inverter, rack, and towing equipment.
- Agency reserves the right to accept or reject substitutions in the best interest of the agency.

VEHICLE ORDER CONFIRMATION

CNGP530

Dealer: F21669

==>

Page: 1 of 2

2026 F-SERIES SD

Order No: 6350 Priority: E3 Ord FIN: KG091 Order Type: 5B Price Level: 645  
Ord PEP: 640A Cust/Flt Name: OAK RIDGE PO Number:

W3H	F350 4X4 CRW CC	RETAIL \$58805	14000# GVWR PKG	RETAIL
	179" WHEELBASE		50 STATE EMISS	NC
Z1	OXFORD WHITE		JOB #1 BUILD	
A	VNYL 40/20/40		512 SPARE TIRE/WHL2	350
S	MED DARK SLATE		52B TRLR BRAKE CONT	300
640A	PREF EQUIP PKG		61J JACK	NC
	.XL TRIM		65Z AFT AXLE TANK	NC
572	.AIR CONDITIONER	NC		
	.AMFM/MP3/CLK		TOTAL BASE AND OPTIONS	63315
99N	.7.3L DEV V8 ENG		TOTAL	63315
44G	10-SPD AUTOMATC	NC	*THIS IS NOT AN INVOICE*	
TBM	LT245 BSW AT 17	165	*TOTAL PRICE EXCLUDES COMP PR	
X4L	4.30 LTD SLIP	385	* MORE ORDER INFO NEXT PAGE *	
	FLEET SPCL ADJ	NC	F8=Next	
	FRT LICENSE BKT	NC	F3/F12=Veh Ord Menu	

F1=Help F2=Return to Order F3/F12=Veh Ord Menu  
 F4=Submit F5=Add to Library F9=View Trailers QC05623

58942.00  
 20706.31  


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 79,648.31  
 - 1200.00  


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 78448.31  
 Gov't FLEET INCENTIVE

CNGP530

VEHICLE ORDER CONFIRMATION

03/07/26 12:23:39

=>

Dealer: F21669

2026 F-SERIES SD

Page: 2 of 2

Order No: 6350 Priority: E3 Ord FIN: KG091 Order Type: 5B Price Level: 645  
Ord PEP: 640A Cust/Flt Name: OAK RIDGE PO Number:

RETAIL

RETAIL

794 PRICE CONCESSN  
REMARKS TRAILER  
872 RR CAM & PREP K 515  
CONNECT PKG 1YR  
SP DLR ACCT ADJ  
SP FLT ACCT CR  
FUEL CHARGE  
B4A NET INV FLT OPT NC  
PRICED DORA NC  
DEST AND DELIV 2795

TOTAL BASE AND OPTIONS 63315  
TOTAL 63315

\*THIS IS NOT AN INVOICE\*

\*TOTAL PRICE EXCLUDES COMP PR

F1=Help F2=Return to Order  
F4=Submit F5=Add to Library F9=View Trailers

F7=Prev

F3/F12=Veh Ord Menu

QC05623

# F-350® Super Duty® Chassis Cab

## MAXIMUM LOADED TRAILER WEIGHT (lbs.)<sup>1</sup>

Trailer weights shown assume 715-lb.-1,115-lb. second-unit body weight.

### CONVENTIONAL TOWING<sup>2</sup>

Automatic Transmission		REGULAR CAB CHASSIS						SUPERCAB CHASSIS				CREW CAB CHASSIS			
Engine	Axle Ratio GCWR (lbs.)	4x2 SRW 145.3" WB	4x4 SRW 145.3" WB	4x2 DRW 145.3" WB	4x2 DRW 169.3" WB	4x4 DRW 145.3" WB	4x4 DRW 169.3" WB	4x2 SRW 167.9" WB	4x4 SRW 167.9" WB	4x2 DRW 167.9" WB	4x4 DRW 167.9" WB	4x2 SRW 179.8" WB	4x4 SRW 179.8" WB	4x2 DRW 179.8" WB	4x4 DRW 179.8" WB
6.7L V8 Diesel	3.73 31,000		13,500						13,500			13,500	13,500		
	4.10 34,000			17,500	17,500	17,500	17,500					17,500		17,500	17,500
7.3L V8	3.73 23,500			16,400	16,100	16,000	15,700			15,900	15,600			15,900	15,500
	4.30 27,200	13,500	13,500					13,500	13,500			13,500	13,500		
	27,500			17,500	17,500	17,500	17,500			17,500	17,500			17,500	17,500

### 5TH-WHEEL TOWING

6.7L V8 Diesel	3.73 31,000		22,700							20,100			21,100	19,600		
	4.10 34,000			26,000	25,800	25,600	25,400					25,200		25,500	25,100	
7.3L V8	3.73 23,500			16,200	16,000	15,900	15,600			15,800	15,400			15,700	15,300	
	4.30 27,200	20,300	19,800					19,900	19,400			19,700	19,300			
	27,500			20,200	20,000	19,900	19,600			19,800	19,400			19,700	19,300	

### GOOSENECK TOWING

6.7L V8 Diesel	3.73 31,000		23,100							20,900			21,900	20,500		
	4.10 34,000			26,100	25,900	25,800	25,500					25,300		25,600	25,200	
7.3L V8	3.73 23,500			16,300	16,100	16,000	15,700			15,900	15,500			15,800	15,400	
	4.30 27,200	20,400	20,000					20,000	19,600			19,900	19,400			
	27,500			20,300	20,100	20,000	19,700			19,900	19,500			19,800	19,400	

# F-450® Super Duty Chassis Cab

## MAXIMUM LOADED TRAILER WEIGHT (lbs.)<sup>1</sup>

Trailer weights shown assume 715-lb.-1,115-lb. second-unit body weight.

### CONVENTIONAL TOWING<sup>2</sup>

Automatic Transmission		REGULAR CAB CHASSIS						SUPERCAB CHASSIS				CREW CAB CHASSIS					
Engine	Axle Ratio GCWR (lbs.)	4x2 DRW 145.3" WB	4x2 DRW 169.3" WB	4x2 DRW 193.3" WB	4x2 DRW 205.3" WB	4x4 DRW 145.3" WB	4x4 DRW 169.3" WB	4x4 DRW 193.3" WB	4x4 DRW 205.3" WB	4x2 DRW 167.9" WB	4x2 DRW 192.0" WB	4x4 DRW 167.9" WB	4x4 DRW 192.0" WB	4x2 DRW 179.8" WB	4x2 DRW 203.8" WB	4x4 DRW 179.8" WB	4x4 DRW 203.8" WB
6.7L V8 Diesel	4.10 34,500	17,500	17,500	17,500	17,500	17,500	17,500	17,500	17,500		17,500	17,500	17,500	17,500	17,500	17,500	17,500
	4.30 39,000 <sup>3</sup>	17,500	17,500	17,500	17,500	17,500	17,500	17,500	17,500		17,500	17,500	17,500	17,500	17,500	17,500	17,500
7.3L V8	4.88 30,000	17,500	17,500	17,500	17,500	17,500	17,500	17,500	17,500	17,500		17,500	17,500	17,500	17,500	17,500	17,500

### 5TH-WHEEL TOWING

6.7L V8 Diesel	4.10 34,500	25,700	25,600	25,300	25,100	25,500	25,200	24,800	24,700		25,100	25,100	24,800	25,300	24,900	24,900	24,700
	4.30 39,000 <sup>3</sup>	30,200	30,100	29,800	29,600	30,000	29,700	29,300	29,200		29,600	29,600	29,300	29,800	29,400	29,400	29,200
7.3L V8	4.88 30,000	22,000	21,800	21,500	21,300	21,700	21,400	21,100	21,000	21,600		21,300	21,000	21,500	21,200	21,200	20,900

### GOOSENECK TOWING

6.7L V8 Diesel	4.10 34,500	25,800	25,700	25,400	25,200	25,600	25,400	25,000	24,900		25,200	25,200	24,900	25,400	25,000	25,100	24,900
	4.30 39,000 <sup>3</sup>	30,300	30,200	29,900	29,700	30,100	29,900	29,500	29,400		29,700	29,700	29,400	29,900	29,500	29,600	29,400
7.3L V8	4.88 30,000	22,100	21,900	21,600	21,400	21,900	21,600	21,200	21,100	21,700		21,400	21,200	21,600	21,400	21,300	21,100

Notes: • Combined weight of vehicle and trailer cannot exceed listed GCWR.

• Do not exceed the Maximum Loaded Trailer Weight listed.

• Trailer tongue (trailer king pin for 5th-wheel towing) load weight should be 10% (15% for 5th-wheel and gooseneck towing) of total loaded trailer weight. Make sure vehicle payload (reduce by option weight) will accommodate trailer tongue (trailer king pin for 5th-wheel towing) load weight and weight of passengers and cargo added to towing vehicle. Addition of trailer tongue (trailer king pin for 5th-wheel towing) load weight and weight of passengers and cargo must not cause vehicle weights to exceed rear GAWR or GVWR. These ratings can be found on the vehicle Safety Compliance Certification Label.

• Trailer towing values are the same for weight-carrying and weight-distributing hitches.

• If using load bars for weight distribution, Ford recommends 50% front axle load restoration (FALR).

1. Maximum towing capabilities are for properly equipped vehicles with required equipment and a 150-lb. driver and passenger and vary based on cargo, vehicle configuration, accessories, option content and number of passengers. For additional information, see your Ford Dealer. 2. Super Duty Chassis Cab does not offer a conventional hitch receiver as a factory-installed option. 3. Requires Trailer Tow Package - High Capacity (535).

**PAYMENT OPTIONS**

Cash No Fee  
 Debit Card No Fee  
 Checks No Fee  
 Open Account No Fee  
 Credit Cards 3% Service Charge  
 Returned Check \$35 Per Check



**PHOENIX CONVERSIONS**

5915 Casey Dr, Knoxville, TN 37909-1808  
 Phone: (865) 670-4060 Fax: (865) 670-4080

**QUOTE # 853202**

**DATE: 3/9/2026**

**SPECIAL ORDER PARTS (SOP)**  
 Must have a 50% non-refundable deposit. SOP cannot be cancelled or returned for refunds, credits, exchanges or adjustments.

TERMS: NET 10TH  
 ENTERED BY: CHRIS

<b>SOLD TO:</b> 62269
RAY VARNER FORD, LLC 2026 N. CHARLES G. SEVIERS BLVD. ATTN: ACCTS. PAYABLE CLINTON, TN 37716-0456
PHONE: (865) 457-0704 EMAIL: ACCOUNTSPAYABLE@THOMPSONTRUCKGROUP.COM

<b>SHIP TO:</b>
RAY VARNER FORD, LLC 2026 N. CHARLES G. SEVIERS BLVD. ATTN: ACCTS. PAYABLE CLINTON, TN 37716-0456
PHONE: EMAIL:

<b>VEHICLE INFORMATION</b>	YEAR	2026	MAKE	FORD	MODEL	F350	COLOR	WHITE
	DOORS	4	CAB	CC	BED	60	D/T	WD
	VIN#		MILEAGE		STOCK#		UNIT#	

QTY	PART#	DESCRIPTION	UNIT PRICE	TOTAL
1	RTB-ZZZ	READING 9' CLASSIC II W/ OPTIONS	15,075.00	15,075.00
1	GOP-GP-ISW2000-12	GP-ISW2000-12: 2000 WATT PURE SINE WAVE INVERTER -	964.25	964.25
1	GOP-GP-DC-KIT4	GP-DC-KIT4: INSTALL KIT 2000-2500W / 24V 3100-4-000	456.00	456.00
1	ADS-43293	First Aid Kit w/ Holder, 11w x 4.5h x 3d, Gray, Wh	185.07	185.07
1	PCI-MISC	SAFETY TRIANGLE KIT	31.00	31.00
1	BUC-13315	Buckeye 2.5lb ABC Dry Chemical Fire Extinguisher	44.99	44.99
1	PCI-SBC	SERVICE BODY STEEL PACK CHARGE	75.00	75.00
1	PCI-SH	SHIPPING & HANDLING	350.00	350.00
12	PCI-PP	PER HOUR LABOR RATE - PCI SUPPLIED PARTS	145.00	1,740.00

**Quote Valid For 14 Days**

DOES NOT APPLY TO CLEARANCE OR DISCONTINUED ITEMS

Parts cannot be returned after 30 days and all returns are subject to a 25% restocking fee. Refunds for payments made by cash or checks will be paid within 10 days by company check. I also grant PCI employees permission to operate the vehicle herein described on streets, highways or elsewhere for the purpose of testing and/or inspection or completion of work approved. An express merchant's lien is hereby acknowledged on above vehicle to secure the amount of repair thereb. Storage of \$25.00 per day will be charged after 72 hours from completion of work.

Warranties on the products sold are those made by the manufacturer(s) of those products. PHOENIX CONVERSIONS, INC. expressly disclaims all warranties, either expressed or implied, including any implied warranty of merchantability or fitness for a particular purpose, and neither assumes nor authorizes any other person to assume for it any liability in connection with the sale of said products. We guarantee our work for 12 months or 12,000 miles, whichever comes first. If our repair or replacement fails in normal service within that period, we fix it free of charge. Parts & labor.

Sub Total	20,706.31
Sales Tax	.00
<b>Total</b>	<b>20,706.31</b>
Deposit	
<b>Balance Due</b>	<b>20,706.31</b>

**AUTHORIZED SIGNATURE** \_\_\_\_\_

**PAYMENT OPTIONS**

Cash	No Fee
Debit Card	No Fee
Checks	No Fee
Open Account	No Fee
Credit Cards	3% Service Charge
Returned Check	\$35 Per Check



# PHOENIX CONVERSIONS

5915 Casey Dr, Knoxville, TN 37909-1808  
 Phone: (865) 670-4060 Fax: (865) 670-4080

**QUOTE # 853202**

**DATE: 3/9/2026**

**SPECIAL ORDER PARTS (SOP)**  
 Must have a 50% non-refundable deposit. SOP cannot be cancelled or returned for refunds, credits, exchanges or adjustments.

**TERMS:** NET 10TH  
**ENTERED BY:** CHRIS

<b>SOLD TO:</b> 62269
RAY VARNER FORD, LLC 2026 N. CHARLES G. SEVIERS BLVD. ATTN: ACCTS. PAYABLE CLINTON, TN 37716-0456
<b>PHONE:</b> (865) 457-0704 <b>EMAIL:</b> ACCOUNTSPAYABLE@THOMPSONTRUCKGROUP.COM

<b>SHIP TO:</b>
RAY VARNER FORD, LLC 2026 N. CHARLES G. SEVIERS BLVD. ATTN: ACCTS. PAYABLE CLINTON, TN 37716-0456
<b>PHONE:</b> <b>EMAIL:</b>

<b>VEHICLE INFORMATION</b>	<b>YEAR</b> 2026	<b>MAKE</b> FORD	<b>MODEL</b> F350	<b>COLOR</b> WHITE
	<b>DOORS</b> 4	<b>CAB</b> CC	<b>BED</b> 60	<b>D/T</b> WD
	<b>VIN#</b>	<b>MILEAGE</b>	<b>STOCK#</b>	<b>UNIT#</b>

QTY	PART#	DESCRIPTION	UNIT PRICE	TOTAL
1	HMN-12103	The Pro Rack Side Channel Kit - Long Bed, Crew Cab	810.00	810.00
1	HMN-12004	The Pro Rack Leg & Crossbar Kit - Service Bodies, SERVICE BODIES, BLACK	975.00	975.00

READING 9' CLASSIC II WITH THE FOLLOWING OPTIONS:  
 FLIP TOP  
 LATCHMATIC  
 LED COMPARTMENT LIGHTING

**Quote Valid For 14 Days**

DOES NOT APPLY TO CLEARANCE OR DISCONTINUED ITEMS

Parts cannot be returned after 30 days and all returns are subject to a 25% restocking fee. Refunds for payments made by cash or checks will be paid within 10 days by company check. I also grant PCI employees permission to operate the vehicle herein described on streets, highways or elsewhere for the purpose of testing and/or inspection or completion of work approved. An express merchant's lien is hereby acknowledged on above vehicle to secure the amount of repairs thereon. Storage of \$25.00 per day will be charged after 72 hours from completion of work.

Warranties on the products sold are those made by the manufacturer(s) of those products. PHOENIX CONVERSIONS, INC. expressly disclaims all warranties, either expressed or implied, including any implied warranty of merchantability or fitness for a particular purpose, and neither assumes nor authorizes any other person to assume for it any liability in connection with the sale of said products. We guarantee our work for 12 months or 12,000 miles, whichever comes first. If our repair or replacement fails in normal service within that period, we fix it free of charge. Parts & labor.

<b>Sub Total</b>	20,706.31
<b>Sales Tax</b>	.00
<b>Total</b>	20,706.31
<b>Deposit</b>	
<b>Balance Due</b>	20,706.31

**AUTHORIZED SIGNATURE** \_\_\_\_\_

The 2026 Ford F-350 Chassis Cab comes with a 3-year/36,000-mile bumper-to-bumper warranty, a 5-year/60,000-mile powertrain warranty, and 5-year/60,000-mile roadside assistance. Corrosion coverage lasts for 5 years with unlimited miles. Qualified commercial users may receive an extended 5-year/100,000-mile gas powertrain warranty. 🚚 Ford Pro +4

### Key Warranty Details

- **Basic Warranty:** 3 years / 36,000 miles
- **Powertrain Warranty:** 5 years / 60,000 miles
- ~~**Diesel Engine Warranty:** 5 years / 100,000 miles~~ N/A
- **Roadside Assistance:** 5 years / 60,000 miles
- **Corrosion Coverage:** 5 years / Unlimited miles
- **Safety Restraint System:** 5 years / 60,000 miles

	Suggested Retail Price	Invoice Amount
F455 4X4 CREW CHAS CAB DRW/203 62815	00	59674 00
2026 MODEL YEAR		
Z1 OXFORD WHITE		
AS MEDIUM DARK SLATE VINYL PREFERRED EQUIPMENT PKG. 650A .XL TRIM		
572 .AIR CONDITIONING -- CFC FREE .AM/FM STEREO MP3/CLK	NC	NC
99N .7.3L DEVCT NA PFI V8 ENGINE		
44G 10-SPEED AUTO TORQSHIFT	NC	NC
TGJ 225/70R19.5G BSW ALL POSITION		
X8L 4.88 RATIO LIMITED SLIP AXLE	395 00	360 00
153 FRONT LICENSE PLATE BRACKET	NC	NC
18B PLATFORM RUNNING BOARDS	445 00	405 00
205 16500# GVWR PACKAGE	NC	NC
425 50 STATE EMISSIONS	NC	NC
43C PRO POWER ONBOARD - 400W JOB #1 ORDER	225 00	205 00
52B TRAILER BRAKE CONTROLLER	300 00	273 00
67B 410 AMP DUAL ALTERNATOR	215 00	195 00
86M DUAL BATTERY	NC	NC
872 REAR VIEW CAMERA & PREP KIT CONN PKG: 1 YR INCL W/FORD APP	515 00	468 00
96V XL CHROME PACKAGE .BACKGLASS DEFROST .POWER SLIDING REAR WINDOW .FOG LAMPS .REMOTE START SYSTEM .PRIVACY GLASS	425 00	387 00
TOTAL OPTIONS/OTHER	2520 00	2293 00
TOTAL VEHICLE & OPTIONS/OTHER	65335 00	61967 00
DESTINATION & DELIVERY	2595 00	2595 00
<b>TOTAL FOR VEHICLE</b>	<b>67930 00</b>	
FUEL CHARGE		130 00
CV LOT MANAGEMENT		10 00
SHIPPING WEIGHT 7232 LBS.		
<b>TOTAL</b>	<b>67930 00</b>	<b>64702 00</b>

IN STOCK  
ALTERNATE  
7.3 F-450  
W/ 11 FT MC  
BODY  
STAIR S/C  
BODY

\* WE CAN ADD  
MOST ITEMS  
REQUESTED,  
BUT ARE  
NOT INCLUDED  
IN PRICE

THIS DOES NOT  
MEET BID SPEC,  
ALTERNATE

ALTERNATE SPECS  
SUBJECT TO PRIOR SALE \$80,930  
INCLUDES S/C BODY & LADDER RACK

This invoice may not reflect the final cost of the vehicle in view of the possibility of future rebates, allowances, discounts and incentive awards from Ford Motor Company to the dealer.

Sold to Buster Miles Ford P.O. BOX 367 Heflin		21D561 AL 36264		Order Type 2	Ramp Code CA3J	Batch ID SK091	Price Level 630
Ship to (if other than above)				Date Inv. Prepared 10 09 25		Item Number 21-J17G	Transit Days 15
				Ship Through			
Invoice & Unit Identification NO. 1FD0W4HN7TEC76393		Final Assembly Point KENTUCKY		Finance Company and/or Bank BB&T 666504			
HB	Invoice Total	A & Z Plan	D Plan	X Plan	Protected Invoice Amount	AA	
1307	64702.00					980.00	

KTP-001126 AL

9-NORMAL, HS, 1011126, SK091

4064

UJLN CERTICERBERI PRD RANFEUNFCAMPEOOCXEFIROTABATT

032270 560/1590

1FD0W4HN7 TEC76393 NB

BUB

VEHICLE DESCRIPTION

# SUPER DUTY

2026 F450 4x4 CREW CHASSIS XL 403" WB CHASSIS CAB 7.3L DIESEL NA PELV 8 ENGINE 10-SPEED AUTO TORQSHIFT

# TE C76393

## EPA Fuel Economy and Environment

ford.com

EXTERIOR  
OXFORD WHITE  
INTERIOR  
MEDIUM DARK SLATE VINYL

STANDARD EQUIPMENT INCLUDED AT NO EXTRA CHARGE

- EXTERIOR**
- HEADLAMPS - AUTOLAMP (ON/OFF)
  - HEADLAMPS - WIPER ACTIVATED
  - MIRRORS - HD, PWR GLASS/ MANUAL-FOLD/TURN SIGNALS
  - ROOF CLEARANCE LIGHTS
  - TOW HOOKS
  - TRAILER SWAY CONTROL
  - TRAILER TOW WIRE HARNESS
  - WIPERS - INTERMITTENT

- INTERIOR**
- TOUCH DOWN DR/PASS WINDOW
  - 4.2" CLUSTER DISPLAY
  - AIR COND, MANUAL FRONT
  - BLACK VINYL FLOOR COVERING
  - OUTSIDE TEMP DISPLAY
  - PARTICULATE AIR FILTER
  - POWER LOCKS AND WINDOWS
  - STEERING, TILT/TELESCOPE, CRUISE & AUDIO CONTROLS
  - UPFITTER SWITCHES

- FUNCTIONAL**
- 4-WHEEL ANTILOCK BRAKE SYS
  - 5G MODEM
  - FORD APP
  - HILL START ASSIST
  - JEWEL EFFECT HEADLAMPS
  - REMOTE KEYLESS ENTRY
  - STABILIZER BAR, FRONT/REAR
  - SYNC@4 W/8" SCREEN

- SAFETY/SECURITY**
- ADVANCE TRAC W/ WITH RSC@
  - AIR BAGS - SAFETY CANOPY@
  - BELT-MINDER SAFETY CANOPY@
  - DRIVER/PASSENGER AIR BAGS
  - SECURE PKG, 8 YR INCL. UNDEAD
  - SECURILOCK ANTI-THEFT SYS
  - SOS POST-CRASH ALERT SYS™
  - TIRE PRESSURE MONIT SYS
- WARRANTY**
- 3YR/36,000 BUMPER / BUMPER
  - 5YR/60,000 POWERTRAIN
  - 5YR/60,000 ROADSIDE ASSIST
  - 5YR/100,000 DIESEL ENGINE

INCLUDED ON THIS VEHICLE (MSRP)

- OPTIONAL EQUIPMENT/OTHER**
- PREFERRED EQUIPMENT PKG.650A
  - 10-SPEED AUTO TORQSHIFT
  - 4.88 RATIO LIMITED SLIP AXLE
  - FRONT LICENSE PLATE BRACKET
  - PLATFORM RUNNING BOARDS
  - 16500# GVWR PACKAGE
  - 50 STATE EMISSIONS
  - PRO POWER ONBOARD - 400W
  - TRAILER BRAKE CONTROLLER
  - 410 AMP DUAL ALTERNATOR
  - DUAL BATTERY
  - REAR VIEW CAMERA & PREP KIT
  - CONN PKG: 1 YR INCL W/FORD APP
  - XL CHROME PACKAGE
  - BACKGLASS DEFROST
  - POWER SLIDING REAR WINDOW
  - FOG LAMPS
  - REMOTE START SYSTEM
  - PRIVACY GLASS

PRICE INFORMATION (MSRP)

BASE PRICE	\$62,815.00
TOTAL OPTIONS/OTHER	2,520.00
<b>TOTAL VEHICLE &amp; OPTIONS/OTHER</b>	<b>65,335.00</b>
DESTINATION & DELIVERY	2,595.00

RAMP ONE

CA3J

RAMP TWO

CONVOY

ITEM #: 21-J17G O/T 2

This label is affixed pursuant to the Federal Automobile Information Disclosure Act. Gasoline, License, and Title Fees, State and Local taxes are not included. Dealer installed options or accessories are not included unless listed above.

**TOTAL MSRP \$67,930.00**

Scan The QR Code to get more details about this vehicle

SK091 N RB 2X 630 001126 10 09 25



## fuelconomy.gov

Calculate personalized estimates and compare vehicles.



The FordPass™ Connect modem is factory-installed in every vehicle (e.g., diagnostic port). Set vehicle settings for connectivity options.

\*Based on 1977-2024 CY total sales.  
\*\*FordPass Connect (optional on select vehicles), the FordPass App and complimentary Connected Services are available on select vehicles. See FordPass Terms for details. Connected Services and features depend on compatible AT&T network availability. Evolving technology/cellular network capability may limit functionality and performance. Connected Services are available on select vehicles.  
†Connected service excludes Wi-Fi hotspot.



**Insist on Ford Protect!** The only extended service plan fully backed by Ford and honored at every Ford dealership in the U.S., Canada and Mexico. See your Ford dealer or visit [www.FordOwner.com](http://www.FordOwner.com).

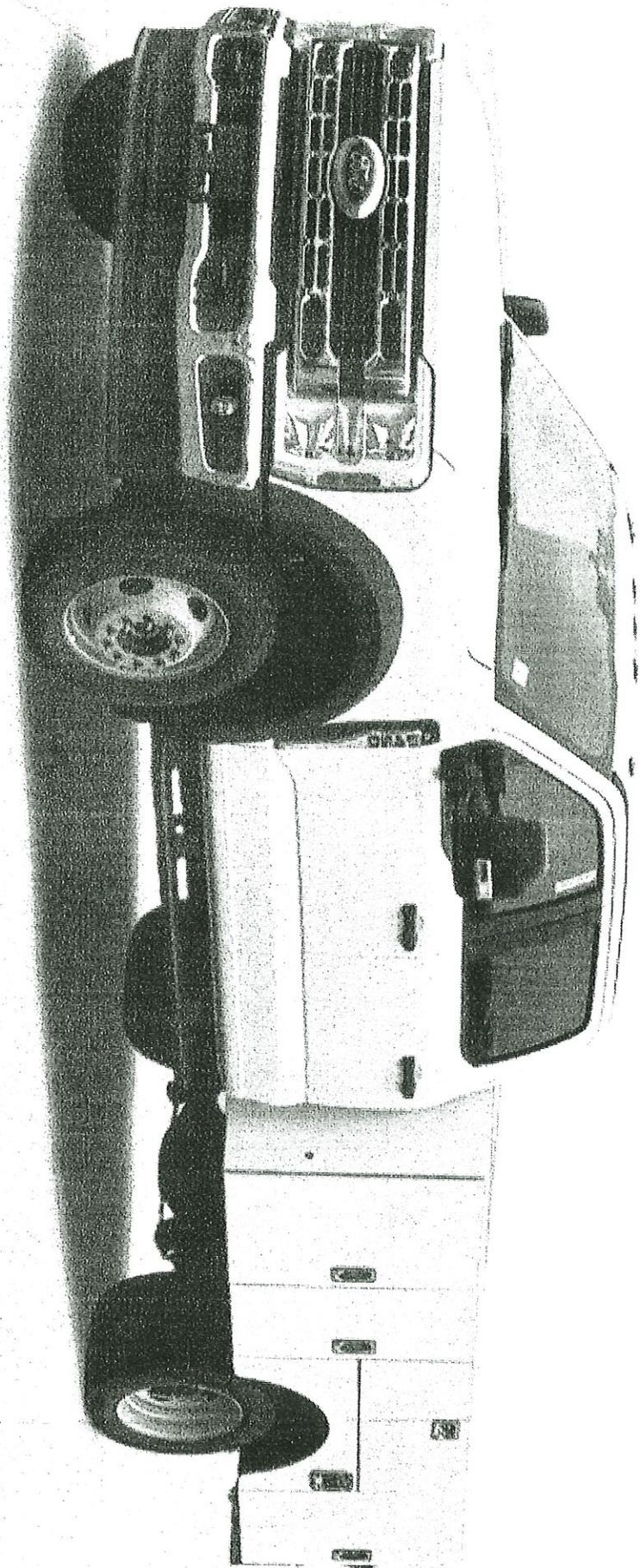


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1FD0W4HN7TEC76393

**WARNING:** Operating, servicing and maintaining a passenger vehicle, pickup truck, van, or off-road vehicle can expose you to chemicals including engine exhaust, carbon monoxide, phthalates, and lead, which are known to the State of California to cause cancer and birth defects or other reproductive harm. To minimize exposure, avoid breathing exhaust; do not idle the engine except as necessary; service your vehicle in a well-ventilated area and wear gloves or wash your hands frequently when servicing your vehicle. For more information go to [www.P65Warnings.ca.gov/passenger-vehicle](http://www.P65Warnings.ca.gov/passenger-vehicle).



## Bid Form

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

Project: **2026 Fleet Trucks**  
**RFP 26-003**

Bid Opening: **2:00 PM EDT, March 11, 2026**

Company Name: Buster M.les Ford

Address: 1880 Almon Street

Hefl., Al 36264

Phone Number: 256-201-3200

Email: tbussey@busterm.les.com

Main Bid: ***This Price is to be for the complete package including delivery. ALL COSTS ARE TO BE INCLUDED IN THE FINAL PRICE.***

Bid Amount Item 1: \$ SEE ATTACHED SPECS USD

Bid Amount Item 2: \$ \_\_\_\_\_ USD

**\*\* You may bid on either one or both specified trucks. \*\***

**Purchase subject to funding. ORS reserves the right to purchase either one or both.**

Company: Buster M.les Ford

Signature: J Bussey

Title: Fleet Manager

Date: 3-9-26

**Please attach detailed specifications.**

**HOLD HARMLESS AGREEMENT**

This Hold Harmless Agreement is between Buster Miles Ford

Name of Contractor

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

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

Name of Contractor: Buster Miles Ford

By: Tekia Bussey

Title: Fleet Manager

STATE OF Alabama  
County of Cleburne

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

T Bussey  
Signature

Witness by hand and Notaries seal at office this 10th day of March,  
year of 2026.

Vanessa Denny  
Notary Public

My Commission Expires: 4-12-26

**NON-COLLUSION AFFIDAVIT**

NON-COLLUSION AFFIDAVIT TO BE EXECUTED  
BY DESIGN-BUILDER

State of Alabama

County of Cleburne

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

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

of March, 2026.

J Bussey  
Signature of Officer

Vanessa Dancy  
Notary Signature MCB 4-12-26

\_\_\_\_\_  
Typed Name of Officer

\_\_\_\_\_  
Office

Notary Seal

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

**IRAN DIVESTMENT ACT REQUIREMENTS**

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

**CERTIFICATION**

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

J Bussey  
Signature

3-9-26  
Date

Telva Bussey  
Printed Name

Fleet Manager  
Title

Buster Miles Ford  
Name of Firm/Company

\*[https://tn.gov/assets/entities/generalservices/cpo/attachments/List\\_of\\_persons\\_pursuant\\_to\\_Tenn\\_Code\\_Annotation\\_12-12-106\\_Iran\\_Divestment\\_Act-July.pdf](https://tn.gov/assets/entities/generalservices/cpo/attachments/List_of_persons_pursuant_to_Tenn_Code_Annotation_12-12-106_Iran_Divestment_Act-July.pdf)

# Request for Taxpayer Identification Number and Certification

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

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

**Before you begin.** For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)  
**BUSTER MILES FORD, INC.**

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

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

- Individual/sole proprietor     C corporation     S corporation     Partnership     Trust/estate
- LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership)  
 Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.
- Other (see instructions)

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

Exempt payee code (if any) \_\_\_\_\_  
 Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) \_\_\_\_\_

(Applies to accounts maintained outside the United States.)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions

5 Address (number, street, and apt. or suite no.). See instructions.  
**1880 ALMON STREET**

6 City, state, and ZIP code  
**HEFLIN, AL 36264**

7 List account number(s) here (optional)

Requester's name and address (optional)

## Part I Taxpayer Identification Number (TIN)

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

Social security number								
			-					

OR

Employer identification number									
6	3	-	1	1	1	1	9	4	5

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

## Part II Certification

Under penalties of perjury, I certify that:

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

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

Sign Here    Signature of U.S. person

*[Handwritten Signature]*

Date

*4/14/25*

## General Instructions

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

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

## What's New

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they

# THOMPSON TRUCK GROUP



**THOMPSON  
TRUCK GROUP**

**TRAILERS**

4801 RUTLEDGE PIKE  
KNOXVILLE, TN 37914

**KNOXVILLE**

4550 RUTLEDGE PIKE  
KNOXVILLE, TN 37914

**MORRISTOWN**

1524 S. DAVY CROCKETT  
MORRISTOWN, TN 37831

**BRISTOL**

4965 LEE HWY  
BRISTOL, VA 24202

**COOKEVILLE**

8220 ROBERTS MATTHEWS  
COOKEVILLE, TN 38506

## INVOICE / BILL OF SALE

DATE	3/10/2026			
CUSTOMER	Oak Ridge Schools			
CUST #				
ADDRESS 1	304 New York Ave.			
ADDRESS 2				
CITY	Oak Ridge	STATE	TN	DRIVER'S LICENSE #
COUNTY		ZIP	37830	INSURANCE CO
PHONE 1	(865) 425-9001	PH 2		POLICY #
EMAIL		SALESPERSON		Manager

UNIT ID	FLEET ID	QTY	YEAR	MAKE	MODEL	VIN	PRICE
			2026	Ford	F350 4x4		\$ 68,133.00
							\$ -
							\$ -
							\$ -
							\$ -
Total Quantity							\$ 68,133.00

NOTES:

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WARRANTY		WARRANTY COST	\$ -
		BODY COST	\$ 20,706.31
		ADDITIONAL COSTS	\$ -

TRADE-IN INFORMATION				
YEAR	MAKE / MODEL	MILEAGE	VIN	TRADE ALLOWANCE
				-
				TRADE PAYOFF
				-
				TRADE EQUITY
				-

LIEN HOLDER INFORMATION		CONT #		TAXABLE TOTAL	\$ 88,839.31
				TN SALES TAX	\$ -
		DATE		FET TAX	\$ -
				WARRANTY TAX	\$ -
				LOCAL SALES TAX	\$ -
				BUSINESS TAX	\$ -
				TIRE ENVIRONMENTAL FEE	\$ -
				TOTAL WITH TAXES	\$ 88,839.31
				DEPOSIT	\$ -
				<b>TOTAL DUE</b>	<b>\$ 88,839.31</b>

CUSTOMER SIGNATURE \_\_\_\_\_
DATE \_\_\_\_\_



Business

Department

School Administration Building

304 New York Ave

Oak Ridge, Tennessee 37830

Phone (865) 425-9005

Fax (865) 425-9060

## Request for Proposal

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

The Oak Ridge Schools Board of Education is soliciting proposals for service trucks for our Maintenance Department. **(RFP 26-003) 2026 Fleet Trucks for Maintenance.**

### ***General Requirements:***

- Proposals, bids, or responses will be accepted by the Oak Ridge Schools Business Department no later than **2:00 PM EDT, March 11, 2026**. Every document must be enclosed in an envelope clearly marked as a bid document. Two full copies of the proposal must be submitted each with original signatures on both Bid Forms (included in this packet). Any response, bid, or proposal received after the above deadline shall be considered late, and will not be opened or considered. Bid prices must be valid for no less than sixty (60) days from the date of the bid.

All documents shall be submitted to the following address:

Mary Ann Riley, Purchasing Specialist  
Re: Fleet Trucks for Maintenance  
(RFP 26-003)  
Oak Ridge Schools  
304 New York Ave  
Oak Ridge, TN 37830

## **SPECIFICATIONS:**

**Oak Ridge Schools is looking to purchase two separate trucks which will be clearly stated. You may bid on both or only one.**

**The vehicle bid specifications are based on Ford specifications. Equivalents will be considered.**

## Item 1:

### 2026 4x4 Gas Crew Cab Pickup Truck with Tow Package

(Ford F-150 XLT or Equal)

- Model Year: **2026**
- Make/Model: **Ford F-150 XLT Crew Cab 4x4**, or equivalent model meeting or exceeding all listed specifications
- Color: **White** (factory OEM white paint)
- **Gasoline engine** required
- Minimum **V6 gasoline engine** (Ford 2.7L EcoBoost or larger OR equivalent “or equal”)
- Minimum **300 horsepower** and **350 lb-ft torque**
- OEM heavy-duty cooling system recommended
- **Automatic transmission**, minimum 10-speed (or current OEM equivalent)
- **Selectable drive modes** including tow/haul mode
- **4-Wheel Drive (4x4)** with electronic shift-on-the-fly
- Standard or upgraded **off-road capable suspension**
  
- Power steering
- Four-wheel power disc brakes with ABS
- All-terrain or highway-rated tires, load-rated for vehicle’s GVWR
- Full-size spare tire and wheel
- **Crew Cab (4 full doors)** with seating for **5 or 6** passengers
- Cloth or heavy-duty vinyl seats
- Vinyl floor
- Air conditioning and heater/defroster
- **Power windows and door locks**
- **Remote keyless entry**
- **Backup camera**, integrated with infotainment screen
- Factory infotainment system with:
  - AM/FM
  - Bluetooth hands-free
  - Rear-camera display
- Tilt/telescoping steering wheel
- 12V outlet(s) and USB/USB-C ports
- Factory floor mats
- Electronic Stability Control (ESC)
- Traction Control
- Airbags: front, side, and curtain as OEM standard

- Tire Pressure Monitoring System (TPMS)
- Rearview camera
- Daytime running lamps
- **OEM Factory Tow Package**, including at minimum:
  - Class IV or better hitch receiver
  - **7-pin trailer wiring connector** (and 4-pin if OEM provides)
  - **Integrated trailer brake controller**
  - **Trailer sway control**
  - Transmission and engine cooling appropriate for towing
  - Tow/haul drive mode
- Vendor must provide OEM tow rating documentation for the offered configuration
- Factory white paint
- Black appearance package acceptable
- LED, halogen, or OEM standard headlights
- Factory-installed bed lighting
- Standard 5.5-ft bed
- Spray-in bedliner
- OEM 12V power system
- All auxiliary equipment professionally fused and wired
- Upfitter switches
- Full OEM warranty package, not less than:
  - **3-year/36,000-mile bumper-to-bumper**
  - **5-year/60,000-mile powertrain**
  - **5-year roadside assistance** (or current OEM standard)
- Vehicle must arrive **fully operational**, cleaned, with minimum ¼ tank of fuel
- Include:
  - Window sticker
  - Manufacturer's certificates
  - Owner's manuals
  - Two (2) key fobs
  - Warranty documentation

## Item 2:

### 2026 4x4 Gas Crew Cab Service Truck with Service Body, Keyless Locking & Inverter

(Ford F-350 XL or equal)

- **Make/Model/Year:** 2026 Ford F-350 XL Super Duty Crew Cab 4x4,
  - **Dual Rear Wheel (DRW)**, minimum **GVWR 11,500 lb**
- **Wheelbase:** Appropriate for selected service body (typically 160–176 in). Vendor to match wheelbase to body; no frame stretching unless pre-approved.
- **Color:** **Oxford White** (or OEM standard white).
  
- **Engine:** OEM **gasoline V8**, minimum **6.8L** displacement (or current OEM gasoline V8 for 2026 MY) producing no less than **300 hp** and **400 lb-ft** torque.
- **Fuel System:** Unleaded gasoline, **minimum 34-gal tank** (larger/twin tanks acceptable).
- **Transmission:** OEM **10-speed automatic** (or current OEM heavy-duty automatic) with tow/haul mode.
- **Cooling:** Heavy-duty engine and transmission cooling, suitable for towing per Section 2.6.
- **Emissions:** Compliant with all applicable **EPA** and **state** emissions requirements at delivery location.
  
- **Drive:** **4x4 (4WD)** with electronic or manual shift-on-the-fly transfer case; **low range required**.
- **Axles:** Heavy-duty front & rear axles sized to GVWR; **limited-slip or locking rear differential**.
- **Suspension:** Heavy-duty springs and shocks appropriate to GVWR and body.
- **Brakes:** 4-wheel power disc brakes with ABS.
- **Steering:** Power steering.
- **Tires/Wheels:** All-terrain or all-season tires, speed/load rated to GVWR; full-size spare tire and wheel.
  
- **Seating:** Crew cab (4 full doors), seating for **5–6**; heavy-duty vinyl seats (easy-clean).
- **Flooring:** Vinyl/rubber easy-clean floor.
- **Climate:** Air conditioning and heater/defroster.
- **Infotainment:** OEM AM/FM with Bluetooth® hands-free, backup camera display.
- **Power Group:** Power windows, power locks, remote keyless entry.
- **Lighting:** Dome/map lights; exterior cargo lamp.
- **Upfitter Switches:** Minimum **4** factory upfitter switches (or equivalent fused switch provisions).
  
- Backup camera (integrated).
- Trailer brake controller (integrated).
- Electronic Stability Control and Traction Control.

- Tire Pressure Monitoring System (TPMS).
- Airbags per OEM standard.
- Daytime running lamps.
  
- **Factory OEM towing package** required, sized to engine/axle ratio.
- **Receiver Hitch:** Class IV (SRW) or Class V (DRW/heavy spec) with **2.5" receiver** and **2" reducer**.
- **Trailer Wiring:** 7-pin RV blade and 4-pin flat connectors.
- **Trailer Brake:** Integrated trailer brake controller.
- **Tow/Haul Mode** and transmission/oil coolers.
- **Minimum Conventional Tow Rating:** Provide OEM rating sheet for the offered configuration (must meet or exceed **12,000 lb** conventional for SRW; **15,000 lb** for DRW; or current OEM rating if higher).
- **Rear Camera/Aim:** Backup camera must remain functional post-upfit.
  
- **On-Board Inverter: 120V AC pure sine wave inverter** suitable for charging cordless/battery-powered tools.
  - **Continuous Output:** ≥ **1,000 W** continuous (**1.5–2.0 kW** preferred).
  - **Peak Output:** ≥ **2,000 W**.
  - **Outlets:** Minimum **(2) GFCI-protected 120V receptacles** mounted in a weather-protected location on the service body, plus **(1) interior 120V outlet** in a curb-side compartment.
  - **Protection:** GFCI, overload, short-circuit, and low-voltage cut-off.
  - **Integration:** Properly fused connection to vehicle electrical system with dedicated battery protection; labeled disconnect switch; comply with **NEC** best practices for vehicle upfits.
  - **Charging Use Case:** Vendor must certify suitability for charging typical 18–60V lithium-ion tool batteries and chargers (Milwaukee/DeWalt/Makita or similar).
  - **Optional (alternate add):** 12V-to-120V inverter with **idle-up** integration and/or **secondary AGM/Deep-cycle auxiliary battery** with automatic charge relay. Provide add/alt pricing.
  
- **Type: 8'–9' utility/service body** compatible with crew cab wheelbase and selected GVWR; body must not exceed axle ratings or compromise OEM ratings.
- **Construction:** Heavy-gauge steel (or aluminum "or equal"), fully seam-welded; reinforced floor; corrosion-resistant primer and **white** topcoat matched to cab.
- **Compartments:**
  - **Both sides:** minimum **3 vertical compartments per side** (front tall, middle, rear) plus full-width tailgate/work surface.
  - **Shelving:** Adjustable shelves with dividers in all vertical compartments.
  - **Top Lids (optional):** Flip-top bins or open top with removable trays on request—vendor to confirm.
  - **Rear Work Surface:** Slam-action tailgate or equivalent; anti-skid surface.

- **Lighting & Compliance:** LED marker, stop/turn/tail; backup lights; DOT/SAE compliant; reflectors as required.
- **Bumper:** Heavy-duty step bumper compatible with tow receiver; anti-skid surface.
- **Bed/Deck:** Non-skid treadplate or spray-in liner on cargo floor and bumper steps.
- **Tie-downs:** Minimum 4 tie-downs in cargo area.
- **Ladder/Material Racks:**
  - **Include** removable or fixed **over-cab ladder/material rack**, 1,000 lb minimum distributed capacity.
  - Tie-down rings and front stop.
  - Rack must not interfere with cab roof antenna or third brake light camera view.
- **Compartment Lighting:** LED strip or puck lighting in all compartments, switched with door activation where feasible.
- **Weatherproofing:** Automotive bulb or D-bulb seals, drip rails, stainless hinges, and latches.
- **System: Centralized, keyless power locking** on all service body compartment doors, integrated with the truck's **remote key fob** where feasible.
- **Controls:** Lock/unlock via OEM remote and an **external master keypad** or **master switch** on the body.
- **Indicators:** Visual/audible confirmation (e.g., flash or chirp) acceptable if compliant with local ordinances.
- **Security:** Stainless steel paddle latches or equivalent; shielded linkages; all cylinders keyed alike; provide **(3) keys** and remote fobs.
- **Fail-Safe:** Manual key override for all doors.
- Use **factory upfitter switches** where possible; otherwise provide labeled, fused switch bank in cab.
- All added circuits **fused/breakered**, loomed, and supported; wiring diagrams to be provided at delivery.
- **Battery Protection:** Low-voltage cutoffs or auxiliary battery recommended for inverter loads.
- **Grounding:** Star-ground or OEM-approved grounding; no paint-through grounds.
- **Tow Hooks:** Front tow hooks.
- **Mudflaps:** Behind rear wheels.
- **Fire Extinguisher & First Aid Kit:** 2.5 lb ABC fire extinguisher w/ bracket; basic ANSI first aid kit mounted in cab.
- **Triangle Kit:** DOT reflective triangle kit.
- **Floor Mats:** Heavy-duty front/rear mats.
- **Owner's Docs:** Operator manuals for truck, service body, inverter, and locking system.
- Vendor must state **GVWR, GAWR (front/rear)**, curb weight (post-upfit), and **payload**.
- Vendor must state **conventional** and **weight-distributing** tow ratings for the exact configuration.

- Service body weight and center-of-gravity must not exceed OEM limits; documentation required.
- **Cab:** OEM e-coat and paint.
- **Body:** Zinc-rich primer and two-component urethane topcoat **white** to match cab (or OEM white powder coat).
- **Hardware:** Stainless steel hinges/fasteners where exposed; cavity wax/rustproofing in seams.
- **Warranty:** Minimum **5-year perforation** on body (or manufacturer standard if longer).
- **FMVSS, SAE, DOT** lighting compliance.
- **OSHA** considerations for safe access and egress.
- Electrical work per **NFPA/NEC** best practices for vehicle upfits.
- **EPA/state emissions** compliance at delivery.
- **Title/Registration:** Must be eligible for titling/registration in **Tennessee** at delivery. Provide MSO and all documentation.
- **Chassis:** OEM **3 yr/36,000 mi** bumper-to-bumper (or current), **5 yr/60,000 mi** powertrain (or current), **5 yr/60,000 mi** roadside assistance (or current). If different for 2026 MY, vendor to state current coverage.
- **Service Body: Minimum 3 years** structural warranty.
- **Electrical/Locking/Inverter: Minimum 2 years** parts & labor.
- **Corrosion:** Per Section 4.
- **Local Service:** Identify nearest authorized service centers for chassis and body.
- **Delivery:** Units must arrive **ready for service**, fueled ( $\geq \frac{1}{4}$  tank), clean, and meeting all specs.
- **Pre-Delivery Inspection (PDI):** Completed; include PDI checklist.
- **Training:** On-site orientation (if needed) covering 4x4 system, towing, inverter operation, and keyless locking.
- **Documentation:** Build sheets, certification labels, wiring diagrams, manuals, spare keys/fobs, warranty contacts.
- Vendors must attach a **line-by-line** exceptions table for any deviations and provide **manufacturer cut sheets** for chassis, service body, lock system, inverter, rack, and towing equipment.
- Agency reserves the right to accept or reject substitutions in the best interest of the agency.

### Submission Requirements:

1. A detailed bid form, which includes quantity and unit cost must be included in the bid package. Please include specification sheets on all products/terms.
2. **Two full copies of the proposal must be submitted**, with original Bid Forms included with each copy.
3. A detailed description of all warranties and support for equipment and software must be included.
4. A copy of your W-9 should be included with bid documents.
5. Any questions should be directed to Mary Ann Riley via email: [orspurchasing@ortn.edu](mailto:orspurchasing@ortn.edu)

### Schedule

1. Sealed bids will be opened at the School Administration Building, 304 New York Avenue, Oak Ridge, TN 37830 at **2:00pm, March 11, 2026.**

## Bidding Procedures

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

Mary Ann Riley,  
Purchasing Specialist  
2026 Fleet Trucks  
(RFP 26-003)  
304 New York Ave.  
Oak Ridge, TN 37830

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**Bid Form**

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

Project: **2026 Fleet Trucks**  
**RFP 26-003**

Bid Opening: **2:00 PM EDT, March 11, 2026**

Company Name: Thompson Truck Group

Address: 4550 Rutledge Pike

Knoxville, TN 37914

Phone Number: 865-850-5843

Email: ztaylor@thompsontruckgroup.com

Main Bid: ***This Price is to be for the complete package including delivery. ALL COSTS ARE TO BE INCLUDED IN THE FINAL PRICE.***

Bid Amount Item 1: \$ \_\_\_\_\_ USD

Bid Amount Item 2: \$ 88,839.31 USD

**\*\* You may bid on either one or both specified trucks. \*\***

**Purchase subject to funding. ORS reserves the right to purchase either one or both.**

Company: Thompson Truck Group

Signature: 

Title: municipal and Vocational Account Manager

Date: 3/10/2026

**Please attach detailed specifications.**

**HOLD HARMLESS AGREEMENT**

This Hold Harmless Agreement is between Thompson Truck Group  
Name of Contractor

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

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

Name of Contractor: Thompson Truck Group

By: Zachery Taylor

Title: municipal Account Manager

STATE OF Tennessee

County of Knox

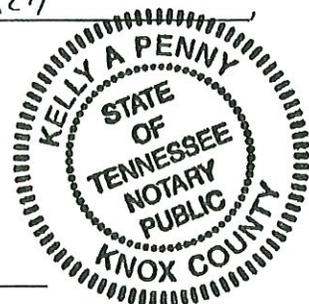
Zachery Taylor personally appeared before me, the undersigned, with whom I am personally acquainted and who, upon oath, acknowledged that he/she/it executed the within instrument for the purposes therein contained, and who further acknowledge that he/she/it is authorized to execute this interment on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

Zachery Taylor  
Signature

Witness by hand and Notaries seal at office this 10 day of MARCH  
year of 2020.

[Signature]  
Notary Public

My Commission Expires: 01/03/2027



**NON-COLLUSION AFFIDAVIT**

NON-COLLUSION AFFIDAVIT TO BE EXECUTED  
BY DESIGN-BUILDER

State of Tennessee

County of Knox

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

Subscribed and sworn to (or affirmed) before me this 10 day

of MARCH, 2026.

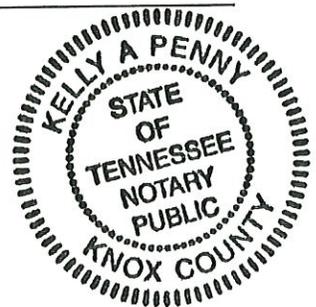
\_\_\_\_\_  
Signature of Officer

  
\_\_\_\_\_  
Notary Signature

\_\_\_\_\_  
Typed Name of Officer

\_\_\_\_\_  
Office

Notary Seal



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

**IRAN DIVESTMENT ACT REQUIREMENTS**

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

**CERTIFICATION**

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

Zach Taylor  
Signature

3/10/2026  
Date

Zachery Taylor  
Printed Name

Municipal Account Manager  
Title

Thompson Truck Group  
Name of Firm/Company

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

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2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645

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**Client Proposal**

Prepared by:

Zack Taylor

Office: 423-622-4161

Quote ID: f-350drw

Date: 03/06/2026



Prepared for: Oak Ridge Schools .

Oak Ridge Schools

Prepared by: Zack Taylor

03/06/2026

Lee-Smith, LLC. | 2600 Eighth Avenue Chattanooga Tennessee | 374071156



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**2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)**

Price Level: 645 | Quote ID: f-350drw

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**Oak Ridge Schools ., Oak Ridge Schools**

Re: Quote ID f-350drw 03/06/2026

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Dear Oak Ridge Schools,

Thank you very much for your interest in acquiring a vehicle from our dealership. We concur that your interest is well deserved. We hope that an outstanding product lineup and our dedication to customer service will enhance your ownership experience should you decide to buy a vehicle from us.

Attached, please find additional information that I hope will assist you in making a more informed decision. Please feel free to contact me at any time as I would truly appreciate the opportunity to be of service to you.

Sincerely,

**Zack Taylor**

Prepared for: Oak Ridge Schools .



Oak Ridge Schools

Prepared by: Zack Taylor

03/06/2026

Lee-Smith, LLC. | 2600 Eighth Avenue Chattanooga Tennessee | 374071156

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## 2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

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## 2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

# Selected Equip & Specs

## Dimensions

• Conventional Capacity: 15,500 lbs. • GCWR: 23,500 lbs. • Fifth-wheel towing capacity: 15,300 lbs. • Gooseneck towing capacity: 15,400 lbs. • Front brake diameter: 14.3" • Rear brake diameter: 14.3" • Vehicle body length: 265.2" • Vehicle body width: 80.0" • Vehicle body height: 82.3" • Wheelbase: 179.0" • Vehicle turning radius: 29.4' • Front track: 69.1" • Rear track: 71.1" • Cab to axle: 60.0" • Rear tire outside width: 92.2" • Axle to end of frame: 47.2" • Frame section modulus: 12.7 cu.in. • Frame yield strength (psi): 50000.0 • Frame rail width: 34.1" • Front bumper to front axle: 38.3" • Front bumper to back of cab: 158.1" • Interior rear cargo volume with seats folded: 52.1 cu.ft. • Max interior rear cargo volume: 52.1 cu.ft. • Total passenger volume: 131.7 cu.ft. • Headroom first-row: 40.8" • Headroom second-row: 40.4" • Leg room first-row: 43.9" • Leg room second-row: 43.6" • Shoulder room first-row: 66.7" • Shoulder room second-row: 65.9" • Hip room first-row: 62.5" • Hip room second-row: 64.7"

## Powertrain

• Spark ignition system • 7.3L V-8 DEVCT variable valve control, engine with 335HP • Engine cylinders: V-8 • Injection Type: sequential MPI • Horsepower: 335 HP@3750 RPM • Torque: 468 lb.-ft.@3750 RPM • Radiator • Auxiliary power take-off • 10-speed automatic • Part-time 4WD • Four-wheel drive • Two-Speed Transfer Case • Recommended fuel: regular unleaded • Driveline managed traction control • Electronic transfer case shift • Auto locking hub control

## Fuel Economy and Emissions

• Gasoline secondary fuel type • Federal emissions

## Suspension and Handling

• Firm ride suspension • Heavy-duty front shock absorbers • Heavy-duty rear shock absorbers

## Driveability

• 4-wheel disc brakes • Front and rear ventilated disc brakes • 4-wheel antilock (ABS) brakes • Four channel ABS brakes • Brake assist system • Hill Start Assist • Mono-beam rigid axle front suspension • Front anti-roll bar • Front coil springs • DANA M300 rigid axle rear suspension • Rear anti-roll bar • Leaf spring rear suspension • Hydraulic power-assist steering system • Re-circulating ball steering • 2-wheel steering system

## Body Exterior

• Trailer wiring harness • 4 doors • Monotone paint • Black side window trim • Black door handles • Black windshield trim • Black front bumper • 2 front tow hooks • Black front bumper rub strip • Black grille • Convex spotter in driver and passenger side door mirrors • Manual extendable trailer mirrors • Turn signal indicator in door mirrors • Black door mirrors • Conventional left rear passenger door • Conventional right rear passenger door • LT245/75RS17 AS BSW front and rear tires • 17 x 6.5-inch front and dual rear argent steel wheels

## Convenience



## 2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

### Selected Equip & Specs (cont'd)

• Power door locks with 2 stage unlocking • Keyfob activated door locks • All-in-one remote fob and ignition key • Auto-locking doors • Cruise control with steering wheel mounted controls • Day/Night rearview mirror • Power first-row windows • Fixed rear windshield • Front beverage holders • Locking glove box • 8 beverage holders • Rear beverage holders • Instrument panel covered bin • Dashboard storage • Retained accessory power • Trip computer • Upfitter switches • Over the air updates • PRND in IP

### Comfort

• Manual climate control • Cabin air filter • Rear under seat climate control ducts • Cloth headliner material • Full headliner coverage • Full vinyl floor covering • Full floor coverage • Vinyl rear seat upholstery • Carpet rear seatback upholstery • Urethane steering wheel • Manual tilting steering wheel • Manual telescopic steering wheel

### Seats and Trim

• Seating capacity: 6 • 40-20-40 split-bench front seat • Driver seat with 4-way directional controls • Front passenger seat with 4-way directional controls • Height adjustable front seat head restraints • Manual front seat head restraint control • Split-bench front seat • Front seat center armrest • Front seat armrest storage • Manual reclining driver seat • Manual driver seat fore/aft control • Manual reclining passenger seat • Manual passenger seat fore/aft control • Fixed rear seats • Height adjustable rear seat head restraints • Split-bench rear seat • Manual driver seat lumbar • Vinyl front seat upholstery

### Entertainment Features

• 2 total number of 1st row displays • 8 inch primary display • Primary touchscreen display • AM/FM stereo radio • AM/FM • In-vehicle audio • AM radio • FM radio • Seek scan • SYNC 4 external memory control • Standard grade speakers • Speakers number: 6 • Steering wheel mounted audio controls • SYNC 4 voice activated audio controls • Speed sensitive volume • Fixed audio antenna

### Lighting, Visibility and Instrumentation

• Digital/analog instrumentation display • Configurable instrumentation gauges • Trip odometer • Digital clock • Compass • Exterior temperature display • Driver information center • Tachometer • Oil pressure gauge • Engine/electric motor temperature gauge • Transmission fluid temperature gauge • Engine hour meter • Gauge cluster display size (inches): 4.20 • Light tinted windows • Reflector headlights • Halogen headlights • Autolamp auto on/off headlight control • Multiple enclosed headlights • Delay-off headlights • DRL preference setting • Variable intermittent front windshield wipers • Illuminated entry • Front reading lights • Rear reading lights • Variable instrument panel light • Daytime running lights • Cab clearance lights • Remote activated perimeter approach lighting • Fade interior courtesy lights

### Technology and Telematics

• SYNC 4 911 Assist emergency SOS system via mobile device • SYNC 4 handsfree wireless device connectivity • Smart device wireless mirroring • FordPass App mobile app access • 5G Modem - Ford Connectivity Package mobile hotspot internet access • 2 USB ports

### Safety and Security



**2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)**

Price Level: 645 | Quote ID: f-350drw

**Selected Equip & Specs (cont'd)**

- Driver front impact airbag • Seat mounted side impact driver airbag • Safety Canopy System curtain first and second-row overhead airbags • Passenger front impact airbag • Seat mounted side impact front passenger airbag • 6 airbags • Front height adjustable seatbelts • SecuriLock immobilizer • Ford Security Package (1-year included with activation) security system • Remote panic alarm • Lane Departure Warning • Pre-Collision Assist with Automatic Emergency Braking (AEB) forward collision mitigation \* **Rear mounted camera** \* **Back-up alarm** • Manual rear child safety door locks

**Dimensions**

*General Weights*

Curb weight .....	6,792 lbs.	Rear curb weight .....	2,832 lbs.
GVWR .....	14,000 lbs.	Payload .....	7,140 lbs.

*Trailer Weights*

Fifth-wheel towing capacity .....	15,300 lbs.	Gooseneck towing capacity .....	15,400 lbs.
Conventional capacity .....	15,500 lbs.	GCWR .....	23,500 lbs.

*Front Weights*

Front curb weight .....	3,960 lbs.	GAWR front .....	5,200 lbs.
Axle capacity front .....	6,000 lbs.	Spring rating front .....	5,200 lbs.
Tire/wheel capacity front .....	5,820 lbs.		

*Rear Weights*

GAWR rear .....	10,300 lbs.	Axle capacity rear .....	10,300 lbs.
Spring rating rear .....	10,300 lbs.	Tire/wheel capacity rear .....	11,640 lbs.

*Off Road*

Min ground clearance .....	8.4"
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*Exterior Measurements*

Vehicle body length .....	265.2"	Vehicle body width .....	80.0"
Vehicle body height .....	82.3"	Wheelbase .....	179.0"
Front brake diameter .....	14.3"	Rear brake diameter .....	14.3"
Rear frame height loaded .....	29.5"	Rear frame height unloaded .....	34.3"
Front track .....	69.1"	Rear track .....	71.1"
Vehicle turning radius .....	29.4'	Cab to axle .....	60.0"
Rear tire outside width .....	92.2"	Axle to end of frame .....	47.2"
Frame section modulus .....	12.7 cu.in.	Frame yield strength (psi) .....	50000.0
Frame rail width .....	34.1"	Front bumper to front axle .....	38.3"
Front bumper to back of cab .....	158.1"		

*Interior Measurements*

Max interior rear cargo volume .....	52.1 cu.ft.	Interior rear cargo volume with seats folded	52.1 cu.ft.
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*Interior Volume*

Total passenger volume .....	131.7 cu.ft.
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*Headroom*



**2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)**

Price Level: 645 | Quote ID: f-350drw

**Selected Equip & Specs (cont'd)**

Headroom first-row.....	40.8"	Headroom second-row.....	40.4"
<i>Legroom</i>			
Leg room first-row.....	43.9"	Leg room second-row.....	43.6"
<i>Shoulder Room</i>			
Shoulder room first-row.....	66.7"	Shoulder room second-row.....	65.9"
<i>Hip Room</i>			
Hip room first-row.....	62.5"	Hip room second-row.....	64.7"

**Powertrain**

*Engine*

Engine.....	7.3L V-8 DEVCT variable valve control, engine with 335HP	Valves per cylinder.....	2
Engine cylinders.....	V-8	Injection type.....	sequential MPI
Engine location.....	Front mounted engine	Ignition.....	Spark ignition system
Engine mounting direction.....	Longitudinal mounted engine	Engine block material.....	Iron engine block
Cylinder head material.....	Aluminum cylinder head		

*Engine Specs*

Displacement.....	7.3L	cc.....	445 cu.in.
Bore.....	4.21"	Stroke.....	3.98"
Compression ratio.....	10.5	SAEJ1349.....	AUG2004 compliant

*Engine Power*

Horsepower.....	335 HP@3750 RPM	Torque.....	468 lb.-ft.@3750 RPM
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*Alternator*

Alternator amps.....	190A	Alternator type.....	Regular duty alternator
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*Battery*

Battery amps.....	68Ah	Battery type.....	HD lead acid battery
Battery rating.....	750CCA	Battery run down protection.....	Battery run down protection

*Engine Extras*

Radiator.....	Radiator	Auxiliary power take-off.....	Auxiliary power take-off
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*Transmission*

Transmission.....	10-speed automatic	Transmission electronic control.....	Transmission electronic control
Overdrive transmission.....	Overdrive transmission	Lock-up transmission.....	Lock-up transmission
First gear ratio.....	4.615	Second gear ratio.....	2.919
Third gear ratio.....	2.132	Fourth gear ratio.....	1.773



## 2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

### Selected Equip & Specs (cont'd)

Fifth gear ratio ..... 1.519  
 Reverse gear ratio ..... 4.695  
 Eighth gear ratio ..... 0.851  
 Tenth gear ratio ..... 0.632  
 Selectable mode transmission ..... Selectable mode transmission  
 Transmission oil cooler ..... Transmission oil cooler

Sixth gear ratio ..... 1.277  
 Seventh gear ratio ..... 1  
 Ninth gear ratio ..... 0.687  
 Stall ratio ..... 1.97  
 Sequential shift control ..... SelectShift Sequential shift control  
 PTO transmission provision ..... PTO transmission provision

#### Drive Type

4WD type ..... Part-time 4WD

Drive type ..... Four-wheel drive

#### Drivetrain

Axle ratio ..... 3.73

#### Exhaust

Tailpipe ..... Stainless steel single exhaust

#### Fuel

Fuel type ..... regular unleaded

#### Fuel Tank

Fuel tank capacity ..... 40.00 gal.

#### Drive Feature

Traction control ..... Driveline managed traction control  
 Transfer case ..... Electronic transfer case shift

Locking hub control ..... Auto locking hub control

### Fuel Economy and Emissions

#### Fuel Economy

Secondary fuel type ..... Gasoline secondary fuel type

#### Emissions

Emissions ..... Federal emissions

### Suspension and Handling

#### Suspension

Suspension ..... Firm ride suspension

Front shock absorbers ..... Heavy-duty front shock absorbers

Rear shock absorbers ..... Heavy-duty rear shock absorbers

### Driveability

#### Brakes



2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

**Selected Equip & Specs (cont'd)**

Brake type ..... 4-wheel disc brakes

ABS brakes ..... Four channel ABS brakes

*Brake Assistance*

Hill start assist ..... Hill Start Assist

*Front Suspension*

Front anti-roll ..... Front anti-roll bar

*Front Spring*

Regular front springs ..... Regular front springs

*Rear Spring*

Springs rear ..... Rear leaf springs

*Rear Suspension*

Rear anti-roll ..... Rear anti-roll bar

Suspension ride type rear. DANA M300 rigid axle rear suspension

*Steering*

Steering ..... Hydraulic power-assist steering system

Steering type number of wheels ..... 2-wheel steering system

Ventilated brakes ..... Front and rear ventilated disc brakes

ABS brakes ..... 4-wheel antilock (ABS) brakes

Brake assist system ..... Brake assist system

Suspension ride type front Mono-beam rigid axle front suspension

Springs front ..... Front coil springs

Rear springs ..... Heavy-duty rear springs

Suspension type rear ..... Leaf spring rear suspension

Steering type ..... Re-circulating ball steering

**Exterior**

*Front Wheels*

Front wheels diameter ..... 17"

Front wheels width ..... 6.5"

*Rear Wheels*

Rear wheels diameter ..... 17"

Rear wheels width ..... 6.5"

*Front And Rear Wheels*

Appearance ..... argent

Material ..... steel

*Front Tires*

Aspect ..... 75

Sidewalls ..... BSW

Tread ..... AS

Width ..... 245mm

Diameter ..... 17"

Speed ..... S

Type ..... LT

Front wheel - RPM ..... 649

*Rear Tires*

Aspect ..... 75

Sidewalls ..... BSW

Tread ..... AS

Diameter ..... 17"

Speed ..... S

Type ..... LT



## 2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

### Selected Equip & Specs (cont'd)

Width ..... 245mm

Rear wheel - RPM ..... 649

#### Body Exterior

##### Trailer

Towing wiring harness ..... Trailer wiring harness

\* **Towing brake controller** ..... **Trailer brake controller**

Towing trailer sway ..... Trailer sway control

##### Exterior Features

Number of doors ..... 4 doors

\* **License plate front bracket** ..... **Front license plate bracket**

##### Body

Body panels . Aluminum body panels with side impact beams

##### Mirrors

Convex spotter ..... Convex spotter in driver and passenger side door mirrors

Turn signal in door mirrors ..... Turn signal indicator in door mirrors

##### Spare Tire

\* **Spare tire** ..... **Full-size spare tire with steel wheel**

\* **Spare tire location** ..... **Spare tire mounted on the frame or chassis**

##### Tires

Front tires LT load rating ..... E

Rear tires LT load rating ..... E

##### Wheels

Dual rear wheels ..... Dual rear wheels

#### Convenience

##### Door Locks

Door locks .. Power door locks with 2 stage unlocking

Keyfob door locks ..... Keyfob activated door locks

All-in-one key .. All-in-one remote fob and ignition key

Auto door locks ..... Auto-locking doors

##### Cruise Control

Cruise control ..... Cruise control with steering wheel mounted controls

##### Rear View Mirror

Day/Night rearview mirror .. Day/Night rearview mirror

##### Exterior Mirrors

Door mirrors ..... Power door mirrors

Folding door mirrors ..... Manual folding door mirrors

Heated door mirrors ..... Heated driver and passenger side door mirrors



2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

Selected Equip & Specs (cont'd)

Front Side Windows

First-row windows ..... Power first-row windows

Overhead Console

Overhead console ..... Full overhead console Overhead console storage Overhead console storage

Passenger Visor

Visor passenger mirror ..... Passenger visor mirror

Power Outlets

12V power outlets ..... 2 12V power outlets

Rear Windshield

Rear windshield ..... Fixed rear windshield

Storage

Number of beverage holders ..... 8 beverage holders Beverage holders rear ..... Rear beverage holders Instrument panel storage ..... Instrument panel covered bin Beverage holders ..... Front beverage holders Glove box ..... Locking glove box Dashboard storage ..... Dashboard storage

Windows Feature

One-touch up window ..... Driver and passenger one-touch up windows One-touch down window ..... Driver and passenger one-touch down windows

Windows Rear Side

Second-row windows ..... Power second-row windows

Miscellaneous

Trip computer ..... Trip computer PRND in IP ..... PRND in IP Upfitter switches ..... Upfitter switches Accessory power ..... Retained accessory power Over the air updates ..... Over the air updates

Comfort

Climate Control

Climate control ..... Manual climate control Cabin air filter ..... Cabin air filter Rear under seat ductsRear under seat climate control ducts

Headliner

Headliner material ..... Cloth headliner material Headliner coverage ..... Full headliner coverage

Floor Trim

Floor covering ..... Full vinyl floor covering Floor coverage ..... Full floor coverage

Second-Row Seat Trim



2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

Selected Equip & Specs (cont'd)

Rear seat upholstery ..... Vinyl rear seat upholstery

Rear seatback upholstery ..... Carpet rear seatback upholstery

Steering Wheel

Steering wheel material ..... Urethane steering wheel

Steering wheel telescopic ..... Manual telescopic steering wheel

Steering wheel tilt ..... Manual tilting steering wheel

Seats and Trim

Seat Capacity

Seating capacity ..... 6

Front Seats

Front seat type ..... Split-bench front seat

Driver seat direction ..... Driver seat with 4-way directional controls

Driver seat fore/aft control ..... Manual driver seat fore/aft control

Passenger seat direction ..... Front passenger seat with 4-way directional controls

Split front seats ..... 40-20-40 split-bench front seat

Reclining passenger seat ..... Manual reclining passenger seat

Passenger seat fore/aft control ..... Manual passenger seat fore/aft control

Front head restraints ..... Height adjustable front seat head restraints

Front head restraint control ..... Manual front seat head restraint control

Armrests front center ..... Front seat center armrest

Armrests front storage ..... Front seat armrest storage

Reclining driver seat ..... Manual reclining driver seat

Rear Seats

Bench seats ..... Split-bench rear seat

Rear seats fixed or removable ..... Fixed rear seats

Folding second-row seats ..... 60-40 folding rear seats

Rear seat direction ..... Front facing rear seat

Rear seat folding position ..... Fold-up rear seat cushion

Rear head restraints ..... Height adjustable rear seat head restraints

Rear head restraint control ..... Manual rear seat head restraint control

Number of rear head restraints ..... 3 rear seat head restraints

Lumbar Seats

Driver lumbar ..... Manual driver seat lumbar

Front Seat Trim

Front seat upholstery ..... Vinyl front seat upholstery

Front seatback upholstery ..... Vinyl front seatback upholstery

Interior Accents

Interior accents ..... Chrome interior accents

Gearshifter Material

Gearshifter material ..... Urethane gear shifter material



## 2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

### Selected Equip & Specs (cont'd)

#### Entertainment Features

##### Displays

Primary touchscreen display ..... Primary touchscreen display  
 Primary display size ..... 8 inch primary display

Number of first-row displays 2 total number of 1st row displays

##### Radio Features

External memory ... SYNC 4 external memory control

Seek scan ..... Seek scan

##### Speakers

Speakers ..... Standard grade speakers

Speakers number ..... 6

##### Audio Features

Steering mounted audio control ..... Steering wheel mounted audio controls

Speed sensitive volume ..... Speed sensitive volume

Voice activated audio ... SYNC 4 voice activated audio controls

#### Lighting, Visibility and Instrumentation

##### Instrumentation

Trip odometer ..... Trip odometer

Instrumentation display Digital/analog instrumentation display

Configurable instrumentation gauges ... Configurable instrumentation gauges

##### Instrumentation Displays

Temperature display ..... Exterior temperature display  
 Clock ..... Digital clock

Driver information center ..... Driver information center  
Compass ..... Compass

##### Instrumentation Gauges

Tachometer ..... Tachometer  
 Transmission temperature gauge ... Transmission fluid temperature gauge  
 Gauge cluster display size (inches) ..... 4.20

Oil pressure gauge ..... Oil pressure gauge  
Engine/electric motor temperature gauge ..... Engine/electric motor temperature gauge  
Engine hour meter ..... Engine hour meter

##### Instrumentation Warnings

Engine temperature warning ..... Engine temperature warning  
 Low fuel warning ..... Low fuel warning  
 Battery charge warning ..... Battery charge warning  
 Key in vehicle warning ..... Key in vehicle warning  
 Service interval warning ..... Service interval indicator

Oil pressure warning ..... Oil pressure warning  
  
Low brake fluid warning ..... Low brake fluid warning  
Headlights on reminder ..... Headlights on reminder  
Door ajar warning ..... Door ajar warning  
Low tire pressure warning ..... Tire specific low air pressure warning



2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

Selected Equip & Specs (cont'd)

Glass

Tinted windows ..... Light tinted windows

Headlights

Headlights ..... Halogen headlights
Auto headlightsAutolamp auto on/off headlight control
Delay off headlights ..... Delay-off headlights

Headlight type ..... Reflector headlights
Multiple headlights ..... Multiple enclosed headlights
DRL preference setting ..... DRL preference setting

Front Windshield

Wipers ... Variable intermittent front windshield wipers

Interior Lighting

Illuminated entry ..... Illuminated entry
Front reading lights ..... Front reading lights

Variable panel light ... Variable instrument panel light
Rear reading lights ..... Rear reading lights

Lights

Running lights ..... Daytime running lights
Clearance lights ..... Cab clearance lights

Interior courtesy lights ... Fade interior courtesy lights
Perimeter approach lighting ..... Remote activated
perimeter approach lighting

Technology and Telematics

Connectivity

Handsfree ..... SYNC 4 handsfree wireless device
connectivity
Emergency SOS SYNC 4 911 Assist emergency SOS
system via mobile device

Smart device integration ..... Smart device wireless
mirroring

Internet Access

Internet access ..... 5G Modem - Ford Connectivity
Package mobile hotspot internet access

USB Ports

USB ports ..... 2 USB ports

Safety and Security

Airbags

Front impact airbag driver ... Driver front impact airbag
Front impact airbag passenger ..... Passenger front
impact airbag
Front side impact airbag passenger ..... Seat mounted
side impact front passenger airbag

Number of airbags ..... 6 airbags
Front side impact airbag driver ..... Seat mounted side
impact driver airbag
Overhead airbags Safety Canopy System curtain first
and second-row overhead airbags

Seatbelts



2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

Selected Equip & Specs (cont'd)

Height adjustable seatbelts ... Front height adjustable seatbelts

Security System

Immobilizer ..... SecuriLock immobilizer
Security system ..... Ford Security Package (1-year included with activation) security system

Remote panic alarm ..... Remote panic alarm

Active Driving Assistance

Lane departure ..... Lane Departure Warning

Forward collision warning .... Pre-Collision Assist with Automatic Emergency Braking (AEB) forward collision mitigation

Cameras

\* Rear camera ..... Rear mounted camera

Parking Sensors

\* Back up alarm ..... Back-up alarm

Occupant Safety

Child door locks ... Manual rear child safety door locks

Prepared for: Oak Ridge Schools .



Oak Ridge Schools  
Prepared by: Zack Taylor  
03/06/2026

Lee-Smith, LLC. | 2600 Eighth Avenue Chattanooga Tennessee | 374071156

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## 2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

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# Warranty

## Standard Warranty

### *Basic Warranty*

Basic warranty ..... 36 months/36,000 miles

### *Powertrain Warranty*

Powertrain warranty ..... 60 months/60,000 miles

### *Corrosion Perforation*

Corrosion perforation warranty ..... 60 months/unlimited

### *Roadside Assistance Warranty*

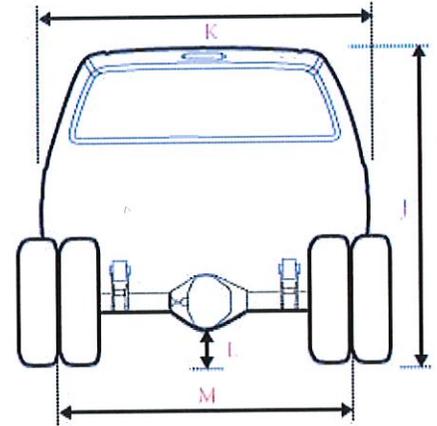
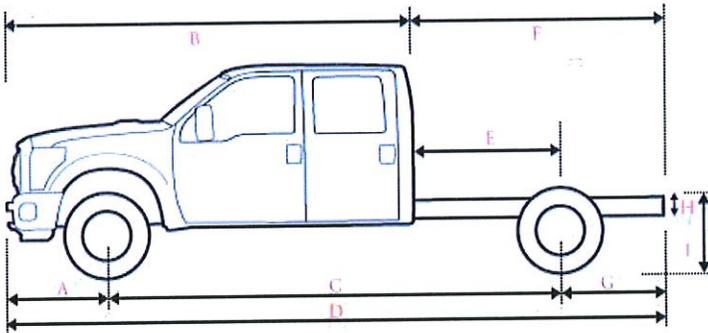
Roadside warranty ..... 60 months/60,000 miles

## 2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

### Vehicle Dimension and Performance Summary

Performance predictions in this report represent an estimate of vehicle performance based on standard operating conditions. Variations in customer equipment, load configuration, ambient conditions, and/or operator driving techniques can cause significant variations in vehicle performance. These values are not representative of results that may be shown in actual dynamometer tests. This report should therefore be used as a guide for comparative vehicle performance.



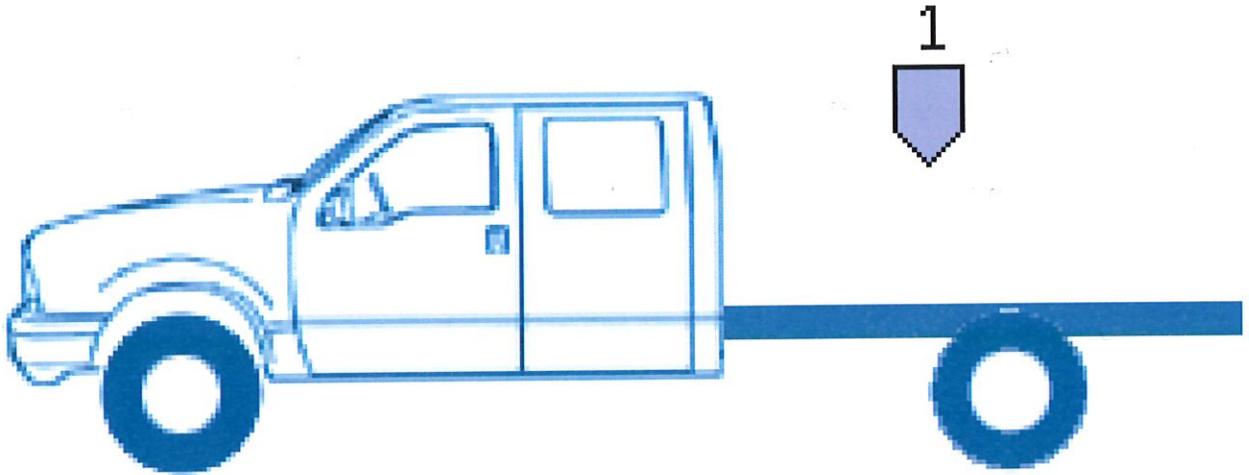
#### Dimensions

A	Front of Bumper to Front Axle	38.30 in.
B	Front Bumper to Back of Cab (BBC)	158.10 in.
C	Wheelbase (WB)	179.00 in.
D	Overall Length (OAL)	265.20 in.
E	Back of Cab to Rear Axle (CA)	60.00 in.
F	Back of Cab to End of Frame	107.20 in.
G	Rear Axle to End of Frame (AF)	47.20 in.
H	Frame Section Height	N/A
I	Rear Frame Height Unloaded	34.30 in.
I	Rear Frame Height Loaded	29.50 in.
J	Cab Height	82.30 in.
K	Body Width	80.00 in.
L	Maximum Ground Clearance	N/A
L	Minimum Ground Clearance	8.40 in.
M	Front Tread	69.10 in.
M	Rear Tread	71.10 in.

2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

## Vehicle Dimension and Performance Summary (cont'd)



### Weight

GVW	Front Axle	Rear Axle	Totals
Chassis .....	3,960 lbs	2,832 lbs	6,792 lbs
Body .....	0 lbs	0 lbs	0 lbs
Occupants Weight .....	600 lbs	300 lbs	900 lbs
1 Max Payload - (Max Payload) .....	640 lbs	7,168 lbs	7,808 lbs
<b>TOTAL</b> .....	<b>5,200 lbs</b>	<b>10,300 lbs</b>	<b>15,500 lbs</b>

Ratings	Front Axle	Rear Axle	GVWR
<b>GAWR</b> .....	<b>5,200 lbs</b>	<b>10,300 lbs</b>	<b>14,000 lbs</b>
Wheels/Tires .....	5,820 lbs	11,640 lbs	
Suspension .....	5,200 lbs	10,300 lbs	
Axle .....	6,000 lbs	10,300 lbs	
Legal Axle Limit .....	0 lbs	0 lbs	

Prices and content availability as shown are subject to change and should be treated as estimates only. Actual base vehicle, package and option pricing may vary from this estimate because of special local pricing, availability or pricing adjustments not reflected in the dealer's computer system. See



**2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)**

Price Level: 645 | Quote ID: f-350drw

**Vehicle Dimension and Performance Summary (cont'd)**

*Start, Grade and Speed*

Start	Ratio	Desired	Calculated
Start grade capability in 1st gear	4.62	15.00 %	34.38 %
Start grade capability in reverse	4.70	15.00 %	34.98 %
Grade	Ratio	Desired	Calculated
Maximum grade in 8th gear	0.85	3.00 %	6.44 %
Maximum grade in 9th gear	0.69	3.00 %	5.20 %
Maximum grade in 10th gear	0.63	3.00 %	4.78 %
Speed		Desired	Calculated
Top Speed (level grade)		75 mph	147 mph
<i>To meet your requirement you need a maximum axle ratio of 8.78</i>			
Top Speed on 3% grade		55 mph	
<i>To meet your requirement you need a maximum of 98 hp</i>			
Cruise Speed		60 mph	102 mph
Engine RPM at desired cruise speed			1,530 rpm

*Variables in Use*

**Start**

Rear axle ratio:	3.73	Clutch engagement torque:	234 ft.lbs.
Tire size:	245/75R17 (649 rev/mile)	Torque conversion ratio:	1.97
Gross Vehicle Weight (GVW):	14,000 lbs		

**Grade**

Rear axle ratio:	3.73	Gross Vehicle Weight (GVW):	14,000 lbs
Tire size:	245/75R17 (649 rev/mile)	Peak engine torque:	468 ft.lbs.

**Speed**

Engine Power:	335 hp @ 3,750 rpm	Worst road surface	Typical Highway
Peak Torque RPM:	3,750 rpm	Final Drive Ratio:	0.63
Frontal Area:	40.72 ft <sup>2</sup>	Drag Coefficient	0.80
Cruising RPM	2,600 rpm		

Prices and content availability as shown are subject to change and should be treated as estimates only. Actual base vehicle, package and option pricing may vary from this estimate because of special local pricing, availability or pricing adjustments not reflected in the dealer's computer system. See



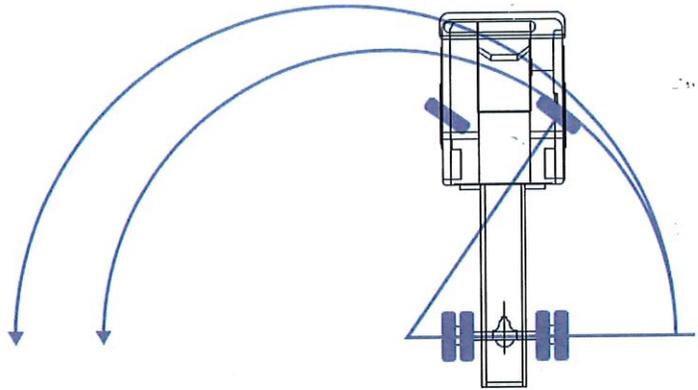
2026 F-350 Chassis 4x4 SD Crew Cab 179" WB DRW XL (W3H)

Price Level: 645 | Quote ID: f-350drw

## Vehicle Dimension and Performance Summary (cont'd)

### Turning Radius

Turning Radius ..... 29.40 ft



**PAYMENT OPTIONS**

Cash	No Fee
Debit Card	No Fee
Checks	No Fee
Open Account	No Fee
Credit Cards	3% Service Charge
Returned Check	\$35 Per Check



**PHOENIX CONVERSIONS**

5915 Casey Dr, Knoxville, TN 37909-1808  
 Phone: (865) 670-4060 Fax: (865) 670-4080

**QUOTE # 853183**

**DATE: 3/5/2026**

**SPECIAL ORDER PARTS (SOP)**  
 Must have a 50% non-refundable deposit. SOP cannot be cancelled or returned for refunds, credits, exchanges or adjustments.

TERMS: NET 10TH  
 ENTERED BY: CHRIS

<b>SOLD TO:</b> 10093
THOMPSON TRUCK GROUP 4550 RUTLEDGE PIKE  KNOXVILLE, TN 37914
<b>PHONE:</b> (865) 546-9781 <b>EMAIL:</b> ACCOUNTSPAYABLE@THOMPSONTRUCKGROUP.COM

<b>SHIP TO:</b> BILLY 865-546-9781 EXT4006
THOMPSON TRUCK GROUP 4550 RUTLEDGE PIKE  KNOXVILLE, TN 37914
<b>PHONE:</b> <b>EMAIL:</b>

<b>VEHICLE INFORMATION</b>	<b>YEAR</b> 2026	<b>MAKE</b> FORD	<b>MODEL</b> F350	<b>COLOR</b> WHITE
	<b>DOORS</b> 4	<b>CAB</b> CC	<b>BED</b> 60	<b>D/T</b> WD
	<b>VIN#</b>	<b>MILEAGE</b>	<b>STOCK#</b>	<b>UNIT#</b>

QTY	PART#	DESCRIPTION	UNIT PRICE	TOTAL
1	RTB-ZZZ	READING 9' CLASSIC II W/ OPTIONS	15,075.00	15,075.00
1	GOP-GP-ISW2000-12	GP-ISW2000-12: 2000 WATT PURE SINE WAVE INVERTER -	964.25	964.25
1	GOP-GP-DC-KIT4	GP-DC-KIT4: INSTALL KIT 2000-2500W / 24V 3100-4000	456.00	456.00
1	ADS-43293	First Aid Kit w/ Holder, 11w x 4.5h x 3d, Gray, Wh	185.07	185.07
1	PCI-MISC	SAFETY TRIANGLE KIT	31.00	31.00
1	BUC-13315	Buckeye 2.5lb ABC Dry Chemical Fire Extinguisher	44.99	44.99
1	PCI-SBC	SERVICE BODY STEEL PACK CHARGE	75.00	75.00
1	PCI-SH	SHIPPING & HANDLING	350.00	350.00
12	PCI-PP	PER HOUR LABOR RATE - PCI SUPPLIED PARTS	145.00	1,740.00

**Quote Valid For 14 Days**

DOES NOT APPLY TO CLEARANCE OR DISCONTINUED ITEMS

Parts cannot be returned after 30 days and all returns are subject to a 25% restocking fee. Refunds for payments made by cash or checks will be paid within 10 days by company check. I also grant PCI employees permission to operate the vehicle herein described on streets, highways or elsewhere for the purpose of testing and/or inspection or completion of work approved. An express mechanic's lien is hereby acknowledged on above vehicle to secure the amount of repairs thereb. Storage of \$25.00 per day will be charged after 72 hours from completion of work.

Warranties on the products sold are those made by the manufacturer(s) of those products. PHOENIX CONVERSIONS, INC. expressly disclaims all warranties, either expressed or implied, including any implied warranty of merchantability or fitness for a particular purpose, and neither assumes nor authorizes any other person to assume for it any liability in connection with the sale of said products. We guarantee our work for 12 months or 12,000 miles, whichever comes first. If our repair or replacement fails in normal service within that period, we fix it free of charge. Parts & labor.

<b>Sub Total</b>	20,706.31
<b>Sales Tax</b>	.00
<b>Total</b>	20,706.31
<b>Deposit</b>	
<b>Balance Due</b>	20,706.31

**AUTHORIZED SIGNATURE** \_\_\_\_\_

**PAYMENT OPTIONS**

Cash	No Fee
Debit Card	No Fee
Checks	No Fee
Open Account	No Fee
Credit Cards	3% Service Charge
Returned Check	\$35 Per Check



**PHOENIX CONVERSIONS**

5915 Casey Dr, Knoxville, TN 37909-1808  
 Phone: (865) 670-4060 Fax: (865) 670-4080

**QUOTE # 853183**

**DATE: 3/5/2026**

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THOMPSON TRUCK GROUP 4550 RUTLEDGE PIKE  KNOXVILLE, TN 37914
<b>PHONE:</b> (865) 546-9781 <b>EMAIL:</b> ACCOUNTSPAYABLE@THOMPSONTRUCKGROUP.COM

<b>SHIP TO:</b> BILLY 865-546-9781 EXT4006
THOMPSON TRUCK GROUP 4550 RUTLEDGE PIKE  KNOXVILLE, TN 37914
<b>PHONE:</b> <b>EMAIL:</b>

QTY	PART#	DESCRIPTION	UNIT PRICE	TOTAL
1	HMN-12103	The Pro Rack Side Channel Kit - Long Bed, Crew Cab	810.00	810.00
1	HMN-12004	The Pro Rack Leg & Crossbar Kit - Service Bodies, SERVICE BODIES, BLACK	975.00	975.00

<b>VEHICLE INFORMATION</b>	<b>YEAR</b> 2026	<b>MAKE</b> FORD	<b>MODEL</b> F350	<b>COLOR</b> WHITE
	<b>DOORS</b> 4	<b>CAB</b> CC	<b>BED</b> 60	<b>D/T</b> WD
	<b>VIN#</b>	<b>MILEAGE</b>	<b>STOCK#</b>	<b>UNIT#</b>

READING 9' CLASSIC II WITH THE FOLLOWING OPTIONS:  
 FLIP TOP  
 LATCHMATIC  
 LED COMPARTMENT LIGHTING

**Quote Valid For 14 Days**

DOES NOT APPLY TO CLEARANCE OR DISCONTINUED ITEMS

Parts cannot be returned after 30 days and all returns are subject to a 25% restocking fee. Refunds for payments made by cash or checks will be paid within 10 days by company check. I also grant PCI employees permission to operate the vehicle herein described on streets, highways or elsewhere for the purpose of testing and/or inspection or completion of work approved. An express merchant's lien is hereby acknowledged on above vehicle to secure the amount of repairs thereto. Storage of \$25.00 per day will be charged after 72 hours from completion of work.

Warranties on the products sold are those made by the manufacturer(s) of those products. PHOENIX CONVERSIONS, INC. expressly disclaims all warranties, either expressed or implied, including any implied warranty of merchantability or fitness for a particular purpose, and neither assumes nor authorizes any other person to assume for it any liability in connection with the sale of said products. We guarantee our work for 12 months or 12,000 miles, whichever comes first. If our repair or replacement fails in normal service within that period, we fix it free of charge. Parts & labor.

<b>Sub Total</b>	20,706.31
<b>Sales Tax</b>	.00
<b>Total</b>	20,706.31
<b>Deposit</b>	
<b>Balance Due</b>	20,706.31

**AUTHORIZED SIGNATURE** \_\_\_\_\_

# Request for Taxpayer Identification Number and Certification

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

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

**Before you begin.** For guidance related to the purpose of Form W-9, see *Purpose of Form*, below.

Print or type. See Specific Instructions on page 3.	<p><b>1</b> Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)</p> <p><b>Thompson Truck Group, LLC</b></p>	
	<p><b>2</b> Business name/disregarded entity name, if different from above.</p> <p><b>Landmark Trucks / Goodpasture Motor Company</b></p>	
	<p><b>3a</b> Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.</p> <p><input checked="" type="checkbox"/> Individual/sole proprietor    <input type="checkbox"/> C corporation    <input type="checkbox"/> S corporation    <input type="checkbox"/> Partnership    <input type="checkbox"/> Trust/estate</p> <p><input type="checkbox"/> LLC. Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) . . . . .</p> <p><b>Note:</b> Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.</p> <p><input type="checkbox"/> Other (see Instructions)</p>	<p><b>4</b> Exemptions (codes apply only to certain entities, not individuals; see Instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____</p> <p><i>(Applies to accounts maintained outside the United States.)</i></p>
	<p><b>3b</b> If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See Instructions . . . . . <input type="checkbox"/></p>	
	<p><b>5</b> Address (number, street, and apt. or suite no.). See Instructions.</p> <p><b>4550 Rutledge Pike</b></p>	<p>Requester's name and address (optional)</p>
	<p><b>6</b> City, state, and ZIP code</p> <p><b>Knoxville, TN 37914</b></p>	
	<p><b>7</b> List account number(s) here (optional)</p>	

**Part I Taxpayer Identification Number (TIN)**

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

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

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

**Part II Certification**

Under penalties of perjury, I certify that:

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

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

<b>Sign Here</b>	Signature of U.S. person	Date <b>11/18/2024</b>
------------------	--------------------------	------------------------

**General Instructions**

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

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

**What's New**

Line 3a has been modified to clarify how a disregarded entity completes this line. An LLC that is a disregarded entity should check the appropriate box for the tax classification of its owner. Otherwise, it should check the "LLC" box and enter its appropriate tax classification.

New line 3b has been added to this form. A flow-through entity is required to complete this line to indicate that it has direct or indirect foreign partners, owners, or beneficiaries when it provides the Form W-9 to another flow-through entity in which it has an ownership interest. This change is intended to provide a flow-through entity with information regarding the status of its indirect foreign partners, owners, or beneficiaries, so that it can satisfy any applicable reporting requirements. For example, a partnership that has any indirect foreign partners may be required to complete Schedules K-2 and K-3. See the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS is giving you this form because they



## Technology Department

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

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

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**Date: March 18, 2026**

**To: Kelly Williams**

**From: Doug Cofer, Director of Technology**

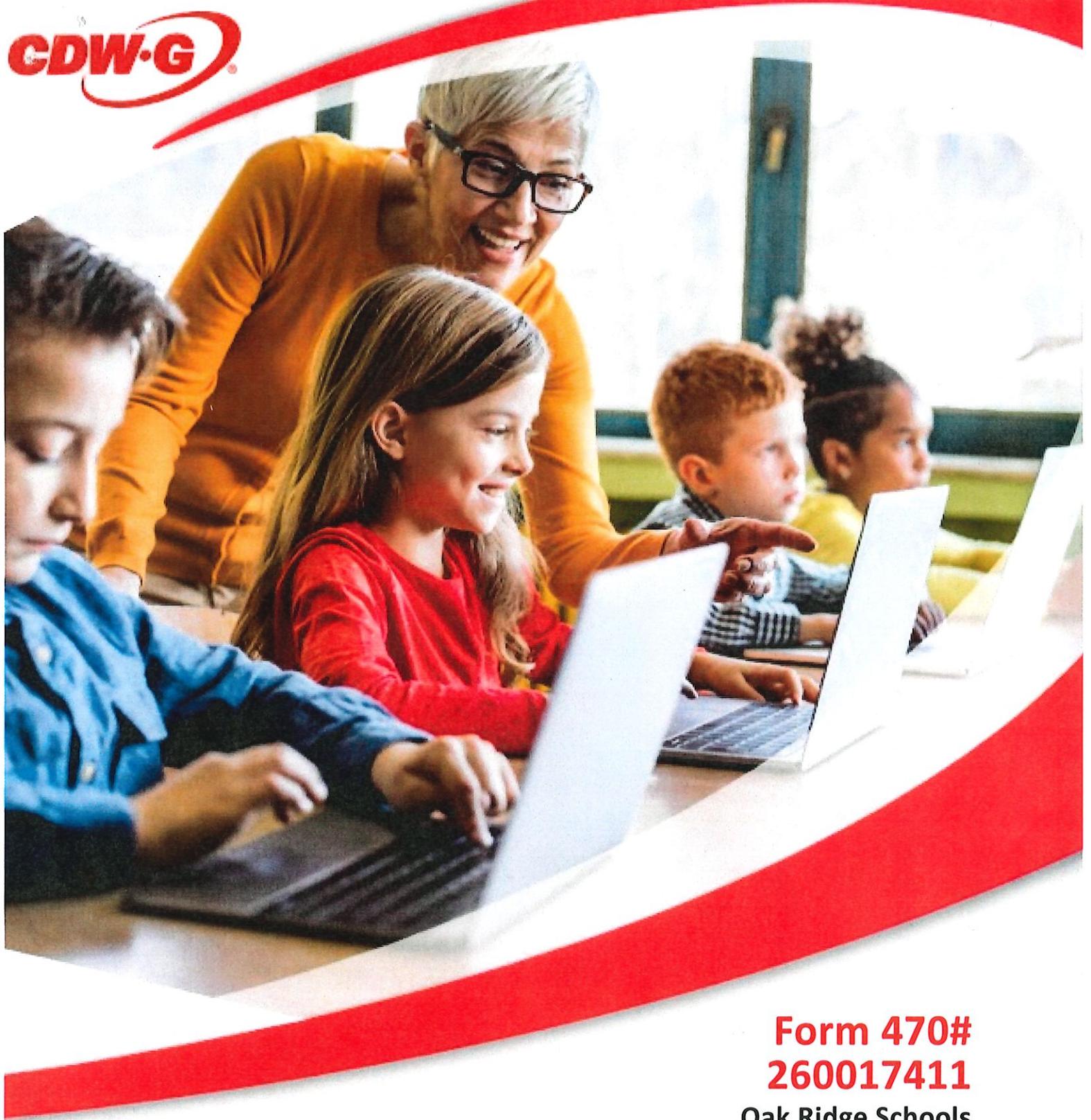
**Subject: Nutanix Software**

I recommend the purchase of the Nutanix Software from CDWG at a total cost to the district of \$184,452.00. This recommendation is contingent upon receiving the E-Rate grant and the approval of proposed expenses in the FY27 budget.

This request leverages the federal E-Rate program for internal connections and local area network electronics (a.k.a., E-Rate, Category 2) to provide schools and libraries with capable network infrastructure at a significant discount. Once approved, the vendor (CDWG), and customer (ORS) have additional steps to complete with Universal Service Administrative Company (USAC, who administers the E-Rate grant for the FCC) before the filing deadline of April 1<sup>st</sup>.

Bidding requirements for this purchase were met by competitive bid. The bid was advertised on the USAC Web site, Knoxville News and Courier News. The bids were due on March 13, 2026. There was a total of two responses to the bid request. This year, for Oak Ridge Schools, requested software totals \$493,620.00. The amount that Oak Ridge Schools will need to pay is \$184,452.00, the balance will be covered by E-Rate and CDWG will be them directly.

---



**Form 470#  
260017411**

**Oak Ridge Schools**

**Deadline: March 13, 2026**

**Funding Year 2026-2027**

**Original**

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



**March 13, 2026**

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

**RE: CDW Government's Response to Oak Ridge Schools's, 470# 260017411**

Dear Doug Cofer,

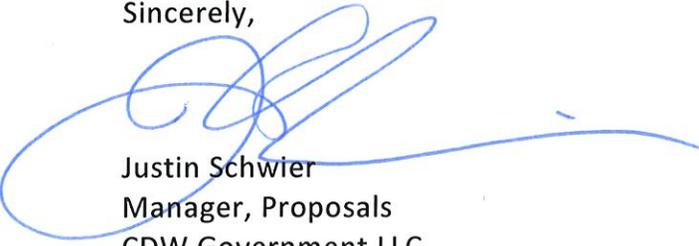
Oak Ridge Schools is seeking to identify a reliable and experienced IT partner capable of managing your E-Rate initiative. Our response demonstrates CDW Government's unique ability to contribute to the overall success of this initiative.

CDW Government LLC (CDW•G) is a global systems integrator, impacting 75 million students across 34 countries. With over 30 years of experience, we are a trusted partner to more than 15,000 school districts nationwide. Benefits of partnering with us include:

- **History of Success:** CDW•G is the leading Value Added Reseller E-Rate provider, participating in the program since 1998. To date we have managed more than 20,816 E-Rate projects for schools and libraries nationwide.
- **Strong Partnerships:** We maintain strong relationships with more than 1,000 vendor partners (OEMs), including leading networking OEMs well-versed in Internal Connections, to provide you with the best products, services, and support.
- **E-Rate Expertise:** Our dedicated in-house technical experts and E-Rate specialists ensure contract compliance, expert handling of the program's specialized invoicing processes, and ongoing consultation.
- **Personalized Support:** Your highly trained and experienced account team includes **Rebekah Marco**, who serves as your primary point of contact, and is responsible for coordinating all your needs.

We thank you for the opportunity to participate in the 470-response process. Please contact your Sr Account Manager, **Rebekah Marco**, at **(312) 547-2962** or **rebmarc@cdwg.com** with any questions.

Sincerely,



Justin Schwier  
Manager, Proposals  
CDW Government LLC

# Pricing Offer and E-Rate Purchase Agreement

Upon award, to facilitate contract execution with our countersignature, please sign the enclosed E-Rate agreement and send to [rebmarc@cdwg.com](mailto:rebmarc@cdwg.com) and [470award@cdwg.com](mailto:470award@cdwg.com).

This E-Rate Customer Purchase Agreement (this "Agreement") is entered into the date the contract is signed, and effective on April 1, 2026 ("Effective Date") and is made by and between CDW Government LLC an Illinois limited liability corporation with an office at 230 N. Milwaukee Ave., Vernon Hills, Illinois 60061 ("Seller"), and Oak Ridge Schools a non-profit school or library eligible for Universal Service funding, as defined below.

<b>E-Rate Contract Number</b>	160845	<b>Spin #</b>	143005588
<b>E-Rate Funding Year</b>	2026	<b>FCC Registration #</b>	0012123287
<b>Customer</b>	Oak Ridge Schools 304 New York Ave Oak Ridge, TN, 37830	<b>Seller</b>	CDW Government LLC 230 N. Milwaukee Avenue Vernon Hills, IL 60061
<b>Effective Date</b>	April 1, 2026	<b>Quoted Items (see Exhibit I)</b>	<b>470# 260017411</b>

#### 1. TERMS AND CONDITIONS

All orders submitted to Seller by Customer for Products under this Agreement are subject to the terms and conditions on Seller's website at <https://www.cdwg.com/content/cdwg/en/terms-conditions/sales-and-service-projects.html> (the "Sales and Service Projects"), unless otherwise stated herein.

#### 2. NON-ASSIGNABILITY AGREEMENT

Customer shall not assign or otherwise transfer its rights or delegate its obligations under this Agreement without Seller's advance written consent. Any attempted assignment, transfer or delegation without such consent shall be void.

The term of this Agreement shall commence on April 1, 2026 ("Effective Date") and be valid through the later of the Funding Year 2026 or 9/30/2027.

- i. Seller may terminate this Agreement at any time for any reason upon thirty (30) days prior written notice to the Customer.
- ii. Customer may terminate this Agreement or withdraw an order upon written notice to Seller if: (a) funds are not appropriated to Customer under this program, or (b) Customer's School Board rejects this Agreement ("Termination Notice"). In the event that Customer terminates this Agreement due to non-appropriation of funds, or termination for convenience, then Seller may immediately cease performance. However, the Customer shall remain liable for any Products that have shipped or services, already provided, or have been subscribed or purchased prior to Seller's receipt of the Termination Notice. Customer shall also be responsible for any of Seller's out-of-pocket costs arising as a result of any such termination.
- iii. In the event Customer receives an extension of funding from SLP, Customer will notify Seller in writing and the parties may agree to execute an amendment to extend this Agreement.

#### 3. GOVERNING LAW

This Agreement will be governed by the laws of TN, without regard to conflicts of law rules. Any litigation will be brought exclusively in a federal or state court located in the state or commonwealth where Customer's location identified above, and the parties consent to the jurisdiction of the federal and state courts located therein, submit to the jurisdiction thereof. The parties further consent to the exercise of personal jurisdiction.

#### 4. PURCHASE AUTHORIZATIONS

CDW Government LLC

SPIN #143005588

March 13, 2026

To the extent allowable, all information and documents hereby submitted in response to FCC 470# 260017411 furnished by Oak Ridge Schools are the Proprietary and Confidential property of CDW Government LLC ("CDW•G").

**A. E-Rate Status**

- i. Customer represents and warrants that it qualifies as eligible under the SLP to receive E-Rate funding.
- ii. CUSTOMER FURTHER ACKNOWLEDGES AND AGREES THAT THIS AGREEMENT, WHEN EXECUTED, CONSTITUTES A CONTRACT AS REQUIRED BY FCC.

**B. E-Rate Purchases**

- i. Customer represents and warrants that all purchases made under this Agreement shall be for its own use and that it is eligible to receive E-Rate funding as specified by USAC.
- ii. IN ACCORDANCE WITH FCC REQUIREMENTS, THE CUSTOMER SHALL SUBMIT A COMPLETED AND SIGNED FCC FORM 486 TO USAC The Form 486 shall be approved by USAC prior to order placement with Seller. See Payment Terms for details.

**5. ORDERING AND ASSISTANCE****A. Ordering**

Purchase orders shall be submitted through electronic means (email, electronic data interchange (EDI), etc.) directly to Customer's dedicated account manager. Alternatively, if a copy must be sent via mail, common courier, etc., please reach out to your account manager for the appropriate mailing address.

**B. Other Requirements**

- i. All purchase orders shall include 1) a contact name; 2) phone number; 3) purchase order number; 4) CDW Part Number and OEM Part Number; 5) Product description; 6) original and discounted Product price 7) percentage Customer owes and percentage SLP owes (if applicable) 8) ship to location; 9) bill to location; 10) BEAR or SPI Order; and 11) FCC Form 471 and Funding Request Number (FRN) number for each part number. SEPARATE PURCHASE ORDERS SHALL BE SUBMITTED FOR PRODUCTS THAT ARE NOT ELIGIBLE FOR E-RATE FUNDING. ALL ORDERS SHALL BE SUBJECT TO ACCEPTANCE BY SELLER.
- ii. If the Customer is unable to commit the full purchase order amount, any balance remaining that was not funded or approved for payment by USAC will be the responsibility of the Customer. The Customer must add the following language to its purchase order:  
  
"The total cost of this purchase order is \$\_\_\_\_\_. The E-Rate portion is \$\_\_\_\_\_, and is committed by USAC. If there is any reduction or denial of payment with the E-Rate portion, Oak Ridge Schools accepts full responsibility for the cost of this purchase, \$\_\_\_\_\_."
- iii. Should Customer choose to add Product or make substitutions to the Products originally sought, following USAC's funding decision, Customer agrees it will be responsible for the amounts owed for the added or substituted Products in excess of its committed funding from USAC.
- iv. Customer must complete installation of Products ordered pursuant to this Agreement within thirty (30) days of delivery. In the event Customer, or a third party hired by Customer to complete the installation, fails to install the Products within the timeframe provided herein, the Parties acknowledge and agree that Customer will begin to accrue interest on the amounts owed for such Products in an amount of one and one-half percent (1.5%) per month, or the maximum rate permitted by applicable law.

**C. Assistance with Order**

- i. Customer may call 1-800-328-4239 to get assistance on any purchase order. Any terms or conditions stated in or on the Customer's purchase order which are inconsistent with or in addition to the terms and conditions in this Agreement or the Product Sales Terms and Conditions shall not be valid, are considered null and void and shall not be applicable to or binding on Seller.

- ii. FOR PRODUCTS WHICH ARE DISCONTINUED AFTER A CUSTOMER ORDER HAS BEEN ACCEPTED BY SELLER BUT BEFORE THE PRODUCT HAS SHIPPED, SELLER WILL MAKE REASONABLE EFFORTS TO OFFER A COMPARABLE OR BETTER PRODUCT AT THE SAME OR LESSER PRICE, IF AVAILABLE, UPON SLP'S APPROVAL OF THE PRODUCT SUBSTITUTION. ANY INCREASE IN PRICE THAT CANNOT BE ABSORBED BY THE SELLER WILL BE THE RESPONSIBILITY OF Oak Ridge Schools.

## 6. PRICE AND PAYMENT TERMS

- i. Payment terms are subject to continuing credit approval by Seller. Seller may change credit or payment terms at any time when, in Seller's opinion, Customer's financial condition, previous payment record, or the nature of Customer's relationship with Seller so warrants.
- ii. Seller may discontinue performance under this Agreement (i) if Customer fails to pay any sum when due under this Agreement or any other agreement with Seller until payment is received or (ii) if Customer is in violation of applicable laws and regulations.

### A. Price

The Price shall be as set forth on the Customer's quote from Seller and which is in the form attached hereto as Exhibit I, and as amended from time to time. All prices are exclusive of federal, state, local, or other taxes, which shall be the responsibility of the Customer.

### Payment Terms

- i. All payments, regardless of method, shall be submitted to "Accounts Receivable," please contact your account manager for payment method options.
- ii. CUSTOMER MAY EITHER WAIT TO PLACE AN ORDER PRIOR TO OR AFTER RECEIPT OF ITS FCDL. IN THE EVENT THAT CUSTOMER PLACES AN ORDER PRIOR TO RECEIPT OF THE FCDL, CUSTOMER SHALL BE RESPONSIBLE FOR PAYMENT OF THE ENTIRE PURCHASE PRICE WITHOUT REGARD TO SLP FUNDING.
- iii. Customer must choose one of the following payment methods. However, Customers that choose to order Products prior to receiving their FCDL must follow the BEAR payment method.
  - Form 474 Service Provider Invoice (SPI) Method**  
Seller will invoice the Customer for the Product price, as set forth on the Product quote, net of the FCDL amount. Customer shall be responsible for making payment within thirty (30) days from date of invoice. There must be an approved FCC Form 486 prior to placing the SPI order.
  - Form 472 Billed Entity Applicant Reimbursement (BEAR) Method**  
Seller will invoice Customer, upon Product shipment, for the total purchase price without regard to any SLP funding applied to that purchase price for the Products. Customer shall pay the invoiced amount within thirty (30) days from the date of invoice.
- iv. Seller accepts BEAR orders beginning April 1 before the beginning of the Funding Year. Seller accepts SPI orders beginning July 1 of the Funding Year when Customer has received its FCDL and completed the FCC Form 486, Seller DOES NOT accept SPI orders before July 1 of the Funding Year, or prior to the Form 486 approval by USAC.

## 7. NOTICES

All notices and other communications required or permitted under this Agreement shall be served in person or sent by U.S. mail, Federal Express, or equivalent carrier to the party's address listed above

## 8. GENERAL

If any term or provision herein is determined to be illegal or unenforceable, the validity or enforceability of the remainder of the terms or provisions herein will remain in full force and effect.

**9. ENTIRE AGREEMENT**

This Agreement constitutes the entire agreement between Seller and Customer and supersedes and replaces any and all previous and contemporaneous communications, representations or agreements between the parties, whether oral or written, regarding transactions hereunder. No provision of this Agreement may be waived or modified except by an amendment signed by an authorized representative of each party.

**10. DOCUMENT RETENTION**

All documents related to this Agreement will be kept on file by both parties for a period of ten (10) years after the project completion in accordance with the rules of the SLP.

**11. DEFINITIONS**

As used in the Agreement, the following terms shall have the meanings set forth below:

- A. "Universal Service Administrative Co." or "USAC" – The not-for-profit organization designated by the U.S. Federal Communications Commission ("FCC") to administer and ensure compliance with the Universal Services Fund.
- B. "SLP" - The Schools and Libraries Program of the Universal Service Fund, which includes the E-Rate Program and that is administered by USAC under the direction of the FCC.
- C. "E-Rate" – The education rate funding program that is a part of SLP that provides discounts to keep students and library patrons connected to broadband and voice services and which is one of the programs that form the Universal Service Program.
- D. "Funding Commitment Decision Letter" or "FCDL" – A letter that a Customer receives from USAC which indicates the applicable discount amount for a specific funding year.
- E. "Products" – E-Rate eligible products or services that include computer related hardware but are not limited to caching servers, routers, switches, wireless access points, installation, and warranty maintenance and other items which are eligible for E-Rate discounts in accordance with the rules issued by USAC.
- F. "Funding Year" – The specific calendar period, as defined by the SLP, during which the Customer is approved for funding or discounts on Products. FY 2026 is in reference to the program year.

IN WITNESS WHEREOF, the parties hereto have executed this Agreement the day and year first above written.

**CDW Government LLC**

**Oak Ridge Schools**

\_\_\_\_\_  
*(Authorized Signature)*

\_\_\_\_\_  
*(Authorized Signature)*

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

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

Title: \_\_\_\_\_

Title: \_\_\_\_\_

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

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

**\*\* Upon award, to facilitate contract execution with our countersignature, please sign the enclosed E-Rate agreement and send to [rebmarc@cdwg.com](mailto:rebmarc@cdwg.com) and [470award@cdwg.com](mailto:470award@cdwg.com)**

## Exhibit I – Pricing Offer

**Please note:** USAC and the FCC makes the final determination on the eligibility of products. Final eligibility of any component (and the E-Rate service category in which discounts should be requested) will be determined by technical configuration (use), installation location, user population served, cost-effectiveness, and other E-Rate regulatory requirements.



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

Hardware      Software      Services      IT Solutions      Brands      Research Hub

# QUOTE CONFIRMATION

### Pricing and Availability Notice

Due to ongoing supply chain challenges, some hardware manufacturers cannot guarantee product availability or pricing until the product is shipped. While we make every effort to honor quoted pricing, if a hardware manufacturer increases its price to CDW after a quote is issued or order is accepted, we may need to update your quoted price to reflect that change irrespective of any timeframes or validity periods set forth in the quote, including up to the date of shipment. In the event of a price adjustment, we will notify you prior to shipment. Any price adjustment would only occur if the hardware manufacturer increases its pricing to CDW.

**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
PTZQ559	3/9/2026	ERATE FY26- NUTANIX ER24	0729655	<b>\$361,241.94</b>

QUOTE DETAILS				
ITEM	QTY	CDW#	UNIT PRICE	EXT. PRICE
<a href="#">Nutanix Minimum Xeon Silver 2X4410Y 16X64GB Rack Server</a> Mfg. Part#: NX-NODE-ER24 Contract: MARKET	6	8073497	\$39,206.99	\$235,241.94
<a href="#">NUTANIX OS+FW+AOS+FLOW INTEG SUB</a> Mfg. Part#: NCI-U-24 Electronic distribution - NO MEDIA Contract: MARKET	12	8084113	\$10,500.00	\$126,000.00

<b>SUBTOTAL</b>	\$361,241.94
<b>SHIPPING</b>	\$0.00
<b>SALES TAX</b>	\$0.00
<b>GRAND TOTAL</b>	<b>\$361,241.94</b>

PURCHASER BILLING INFO	DELIVER TO
------------------------	------------

**Billing Address:**  
OAK RIDGE SCHOOLS  
304 NEW YORK AVE  
OAK RIDGE, TN 37830-5217  
**Phone:** (865) 425-9004  
**Payment Terms:** ERATE QUOTES ONLY

**Shipping Address:**  
OAK RIDGE SCHOOLS  
127 PROVIDENCE RD SUITE 100  
OAK RIDGE, TN 37830  
**Shipping Method:** OMNI LOG 3-5 DAY

**Please remit payments to:**

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)

**Need Help?**



My Account



Support



Call 800.800.4239

[About Us](#) | [Privacy Policy](#) | [Terms and Conditions](#)

This order is subject to CDW's Terms and Conditions of Sales and Service Projects at  
<http://www.cdw.com/content/terms-conditions/product-sales.aspx>

For more information, contact a CDW account manager.

© 2026 CDW•G LLC, 200 N. Milwaukee Avenue, Vernon Hills, IL 60061 | 800.808.4239



**Billing Address:**

OAK RIDGE SCHOOLS  
304 NEW YORK AVE  
OAK RIDGE, TN 37830-5217  
**Phone:** (865) 425-9004

**Payment Terms:** ERATE QUOTES ONLY

**Shipping Address:**

OAK RIDGE SCHOOLS  
127 PROVIDENCE RD SUITE 100  
OAK RIDGE, TN 37830

**Shipping Method:** DROP SHIP-COMMON CARRIER

**Please remit payments to:**

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)

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

Hardware    Software    Services    IT Solutions    Brands    Research Hub

# QUOTE CONFIRMATION

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Due to ongoing supply chain challenges, some hardware manufacturers cannot guarantee product availability or pricing until the product is shipped. While we make every effort to honor quoted pricing, if a hardware manufacturer increases its price to CDW after a quote is issued or order is accepted, we may need to update your quoted price to reflect that change irrespective of any timeframes or validity periods set forth in the quote, including up to the date of shipment. In the event of a price adjustment, we will notify you prior to shipment. Any price adjustment would only occur if the hardware manufacturer increases its pricing to CDW.

**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
PTZQ666	3/9/2026	SERVICES- NON-ERATE	0729655	<b>\$49,620.00</b>

**IMPORTANT - PLEASE READ**

**Special Instructions:** Not E-rate Eligible

**QUOTE DETAILS**

ITEM	QTY	CDW#	UNIT PRICE	EXT. PRICE
<a href="#">Nutanix Infrastructure Modernization Infrastructure Deploy - On-Prem NCI CI</a> Mfg. Part#: CNS-INF-A-SVC-DEP-ONP-AHV Electronic distribution - NO MEDIA Contract: MARKET	6	8081776	\$1,995.00	\$11,970.00
<a href="#">Nutanix Infrastructure Modernization FastTrack for Nutanix Move Application</a> Mfg. Part#: CNS-INF-FST-MOVE Electronic distribution - NO MEDIA Contract: MARKET	1	7260277	\$4,750.00	\$4,750.00
<a href="#">NUTANIX FLOW DEPLOYMENT ESS SVC</a> Mfg. Part#: CNSNETASVCDEPESSFNSSSEINP Electronic distribution - NO MEDIA Contract: MARKET	2	9101309	\$8,500.00	\$17,000.00
<a href="#">NUTANIX FLOW DESIGN ESS SVC</a> Mfg. Part#: CNSNETAWRKDSGNESSFNSSSEWDINP Electronic distribution - NO MEDIA Contract: MARKET	1	9101315	\$15,900.00	\$15,900.00

<b>SUBTOTAL</b>	\$49,620.00
<b>SHIPPING</b>	\$0.00
<b>SALES TAX</b>	\$0.00
<b>GRAND TOTAL</b>	<b>\$49,620.00</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> ELECTRONIC DISTRIBUTION
	<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)

### Need Help?



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This order is subject to CDW's Terms and Conditions of Sales and Service Projects at <http://www.cdw.com/content/terms-conditions/product-sales.aspx>

For more information, contact a CDW account manager.

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**OAK RIDGE CITY SCHOOL DISTRICT**

**CATEGORY 2: Firewall**

**REQUEST FOR PROPOSALS**

**February 13, 2026**

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**SECTION I – SCHEDULE OF EVENTS**

<b>EVENT</b>	<b>DATE</b>
FCC Form 470 Posted/RFP Released	<b>February 13, 2026</b>
Questions from Bidders Due (in writing)	<b>February 27, 2026 3:00 pm EST</b>
Bid Due Date	<b>March 13, 2026 3:00 pm EST</b>
Contract/Service Start Date	<b>July 1, 2026</b>

**SECTION 2 – REQUEST FOR CLARIFICATION**

From the time of receipt of this RFP until the awarding of the contracts, bidders are hereby auctioned to limit any communications with the District to the email addresses named below. Any attempt to circumvent the RFP process by contacting personnel at this institution could result in the disqualification of the bidder.

All questions regarding this Request for Proposal (RFP) should be submitted in writing to Travis Ferguson at [vtferguson@ortn.edu](mailto:vtferguson@ortn.edu) with a cc to Beth McConnell at [beth@ffadvisors.net](mailto:beth@ffadvisors.net) by **February 27, 2026 at 3:00 pm EST.**

**SECTION 3 – SUBMISSION INSTRUCTIONS**

Proposals are due no later than March 13, 2026 at 3pm EST. Late responses may not be considered.

Sealed bids need to be sent to Oak Ridge City Schools:

Oak Ridge Schools – Technology Department  
Susan Dundore  
304 New York Ave  
Oak Ridge, TN 37830

All submitted proposals will be considered the property of Oak Ridge City School District.

This RFP does not commit Oak Ridge City Schools to any specific course of action. Oak Ridge City Schools reserves the right to not select any vendor or purchase any goods or services resulting from this RFP.

**SECTION 4 – RIGHT TO REJECT ANY AND ALL QUOTES**

Oak Ridge City School District reserves the right to accept or refuse bids based on completeness, timeline, price, and meeting of required specifications. The district also reserves the right to negotiate the terms of any proposal.

Oak Ridge City School District does not discriminate on the basis of race, color, national origin, sex, age, or disability in admission to its programs, services, or activities, in access to them, in treatment of individuals, or in any aspect of their operations. Oak Ridge City School District is an equal opportunity provider and employer.

In addition, the District reserves the right to fund, (proceed with project or purchase) or not to fund, regardless of E- rate approval.

**SECTION 5 – TRADE NAMES AND ALTERNATIVES**

Proposals are requested on products that are the functional equivalent or comparable to the brands or items listed in this document. References to brand names, trade names, model numbers, or other descriptions are made to establish an approximate level of quality and functional capabilities and are not intended to exclude other products of similar capabilities. Specific names of products listed in this document are intended to convey the type of equipment sought. Bidders should submit current equipment specification sheets from the manufacturer of all hardware included as a part of a proposal. The District reserves the right to be the sole determiner of functional equivalency and to select the proposal it believes to be in its best interest.

**SECTION 6 – EVALUATION CRITERIA**

It is the intent of the District to award a Contract to the most cost-effective provider based on the Evaluation Criteria below. Per FCC guidelines, cost will carry the greatest weight but other factors important to the District will be considered.

<b>FACTOR</b>	<b>POINTS</b>
Cost of E-rate Eligible Goods and Services	<b>30</b>
Cost of E-rate Ineligible Goods and Services	<b>10</b>
Experience, Qualifications, and Stability *Based on information provided within the proposal and references	<b>25</b>
Project Approach *Based on the project approach submitted in the RFP as well as technical capabilities and methodology	<b>20</b>
Fully Complete Proposal with all Required Elements	<b>15</b>
Total Possible Points	<b>100</b>

**SECTION 7 – TERM OF CONTRACT**

District reserves the right to order quantities in any size lot or lots of quantities. Pricing must remain firm for the period of April 1, 2026 thru September 30, 2027. The District reserves the right to extend the intent to purchase for an additional annual term through September 30, 2028.

## SECTION 8 – PROJECT SPECIFICATIONS

The Goal: To provide qualified vendors with the necessary information and specifications to allow them to respond with a solution that they determine best meets those requirements.

No refurbished equipment is acceptable

The proposed solution price must include a complete bill of materials, applicable sales tax, applicable shipping, and optional professional services.

The scope of the project will be as follows:

- The purpose of this project is to purchase firewall and components
- Standard Manufacturer Warranty

E-Rate rules allow a manufacturer’s multi-year warranty for a period up to three years that is provided as an integral part of an eligible component, without a separate identifiable cost, to be included in the cost of the component. Vendors are required to provide details on warranties.

Included pricing sheet has further details regarding makes, models, and quantities, however, the district will evaluate equivalent makes and models according to ERate guidelines. Vendors are requested to fill out Section 9 – Pricing Sheet in addition to their response.

No refurbished or gray-market equipment will be accepted. All equipment must be new and should be compatible with existing equipment/infrastructure. If the proposed solution is not compatible, the bidder should explain how their solution will fit into the existing network.

**Special note about licenses.** Licenses can be either Internal Connections or Basic Maintenance of Internal Connections, depending on their function.

▪ An internal connections license is software that allows the eligible internal connections equipment to function and distribute high-speed broadband throughout school buildings and libraries. For example, although you may pay once to purchase a wireless access point (WAP), you may need to pay an annual fee to the manufacturer to allow you to use the WAP. The annual fee is the internal connections license (e.g., right-to-use software or client access licenses).

▪ A basic maintenance license includes software upgrades and patches, including bug fixes and security patches, as well as technical support. For example, after purchasing a switch, you may need to pay a separate annual fee to be able to download software updates and get technical support for the device. If licenses are proposed, the vendor should confirm which under which E-rate category they fall. Vendors are also responsible for listing ERate eligibility for each component offered.

Quantities stated in this document are approximate and final numbers may change with final request.

All contracts awarded will be contingent upon the receipt of a Federal E-Rate Program Category Two Funding Commitment Decision Letter. All contracts awarded will be contingent upon approval by the Oak Ridge City School District Board of Education.

SECTION 9 – PRICING SHEET

Description (optional)	Model Number (or equivalent)	Estimated Quantity	Price/Unit	Extended Price (quantity * unit price)	Equivalent Make	Equivalent Model	Product E-rate Eligibility %
Nutanix NCI Cluster Infra Deploy SVC	CNS-INF-A-SVC-DEP-ONP-AHV	6	\$1,995	\$11,970			0%
Nutanix Infrastructure Modernization HCI Micro-Segmentation Deployment-de	CNS-INF-A-SVC-MCR-STD	2	\$8,500	\$17,000	Nutanix service sku: CNS-NET-A-SVC-DEP-ESS-FNS-SSE-IMP		0%
Nutanix Infra Modern SVC	CNS-INF-A-WRK-MCR-STD	1	\$15,900	\$15,900	Nutanix service sku: CNS-NET-A-WRK-DSGN-ESS-FNS-SSE-WD-IMP		0%
Nutanix OS+FW+AOS+FLOW INTEG SUB	NCI-U-24	12	\$10,500	\$126,000			72%
Nutanix Minimum Xeon Silver 2X4410Y 16X64GB Rack Server	NX-NODE-ER24	6	\$39,206.99	\$235,241.94			93%
*FastTrack for Move Application Migration*	*CNS-INF-FST-MOVE*	1	\$4,750	\$4,750			0%
			<b>TOTAL</b>	<b>\$410,861.94</b>	<b>0</b>		

\*ADDITIONAL SERVICE SKU ADDED: CNS-INF-FST-MOVE\*

Total (erate eligible): \$361,241.94

Total (not erate eligible): \$49,620

SECTION 9 – PRICING SHEET

Description (optional)	Model Number (or equivalent)	Estimated Quantity	Price/Unit	Extended Price (quantity * unit price)	Equivalent Make	Equivalent Model	Product E-rate Eligibility %
Nutanix NCI Cluster Infra Deploy SVC	CNS-INF-A-SVC-DEP-ONP-AHV	6	\$1,995	\$11,970			0%
Nutanix Infrastructure Modernization HCI Micro-Segmentation Deployment-de	CNS-INF-A-SVC-MCR-STD	2	\$8,500	\$17,000	Nutanix service sku: CNS-NET-A-SVC-DEP-ESS-FNS-SSE-INP		0%
Nutanix Infra Modern SVC	CNS-INF-A-WRK-MCR-STD	1	\$15,900	\$15,900	Nutanix service sku: CNS-NET-A-WRK-DSGN-ESS-FNS-SSE-WD-INP		0%
Nutanix OS+FW+AOS+FLOW INTEG SUB	NCI-U-24	12	\$10,500	\$126,000	Nutanix	NCI-U-32	72%
Nutanix Minimum Xeon Silver 2X4410Y 16X64GB Rack Server	NX-NODE-ER24	6	\$53,000	\$318,000	Nutanix	NX-NODE-ER32	93%
*FastTrack for Move Application Migration*	*CNS-INF-FST-MOVE*	1	\$4,750	\$4,750			0%
<b>TOTAL</b>				<b>\$493,620</b>	<b>0</b>	<b>0</b>	

\*ADDITIONAL SERVICE SKU ADDED: CNS-INF-FST-MOVE\*

Total (erate eligible): \$444,000

Total (not erate eligible): \$49,620

## E-RATE SUPPLEMENTAL TERMS AND CONDITIONS

**Signed copy to be returned with proposal and/or bid response ("Proposal") in response to this Solicitation.**

The Telecommunications Act of 1996 established a fund by which Schools and Libraries ("Applicant" or "Applicants") across the Country could access discounts on eligible telecommunications products and services. The program is commonly known as the E-rate Program. The eligibility for discounts on internet access, telecommunications products and services, internal connection products, services and maintenance is determined by the Federal Communications Commission ("FCC"). Funding is made available upon application approval by the Universal Service Administrative Company ("USAC"), which was established by the Act. The amount of the discount is based on the numbers of students eligible to receive free and reduced-price meals.

### **1) E-RATE CONTINGENCY**

The project herein may be contingent upon the approval of funding from the Universal Service Fund's Schools and Libraries Program, otherwise known as E-rate. Even after award of Agreement(s) and/or E-rate funding approval is approved, the Applicant may or may not proceed with the project, in whole or in part. Execution of the project, in whole or in part, is solely at the discretion of the Applicant.

### **2) SERVICE PROVIDER REQUIREMENTS**

The Applicant expects Service Providers to make themselves thoroughly familiar with any rules or regulations regarding the E-rate program.

a. Service Providers are required to be in full compliance with all current rules and requirements and future rules and requirements issued by the FCC and USAC throughout the agreement period of any Agreement entered into as a result of this RFP/RFB/RFQ.

b. Service Providers are responsible for providing a valid Service Provider Identification Number ("SPIN"). More information about obtaining a SPIN may be found at this website: <https://www.usac.org/e-rate/service-providers/step-1-obtain-a-spin/>

c. Service Providers are responsible for providing a valid Federal Communications Commission Registration Number ("FRN") at the time the Proposal is submitted. More information about obtaining an FRN may be found at this website: <https://fjallfoss.fcc.gov/coresWeb/publicHome.do>

d. Service Providers are responsible for providing evidence of FCC Green Light Status at the time the proposal is submitted. Any potential Service Provider found to be in Red Light Status must provide an explanation of the steps it is undertaking to be removed to Red Light Status and the expected timeframe for resolution. A Service Provider's sustained Red Light Status may be grounds for termination of the Agreement as it could prohibit the Service Provider from providing E-rate discounts in a timely manner which would cause harm to the Applicant. More information about FCC Red and Green Light Status may be found at this website: [http://www.fcc.gov/debt\\_collection/welcome.html](http://www.fcc.gov/debt_collection/welcome.html)

e. Products and services must be delivered before billing and E-rate discounting can commence. At no time may the Service Provider invoice before July 1, 2026.

f. Prices must be held firm for the duration of the associated E-rate Funding Year(s) or until all work associated with the project is complete (including any Agreement and USAC-approved extensions).

g. Goods and services provided shall be clearly designated as "E-rate Eligible." Non-eligible goods and services shall be clearly called out as 100% non-eligible or shall be "cost allocated" to show the percentage of eligible costs per USAC guidelines.

**h. For Category 2 equipment or services, within one (1) week of notification of award, the awarded Service Provider must provide the Applicant a bill of materials using a completed and most current and appropriate version of USACs "Bulk Upload Template" (formerly known as the Item 21 attachment) located at <https://www.usac.org/e-rate/applicant-process/applying-for-discounts/fcc-form-471-filing/>. Subsequent schedules of values and invoices must match the Bulk Upload Template and approved Funding Request Line Items or subsequent approved service substitutions. If the service provider's proposal consisted of pricing per eligible location, a summary sheet and summary Bulk Upload Template must be provided to describe the cumulative amount for all sites.**

i. In the event of questions during an E-rate pre-commitment review, post-commitment review, and/or audit inquiry, the awarded Service Provider is expected to reply within 3 days to questions associated with its proposal.

j. The awarded Service Provider is required to send copies of all forms and invoices to the Applicant prior to invoicing USAC for pre-approval. Failure to comply with this requirement may result in the Applicant placing the vendor on an "Invoice Check" with the USAC: <https://www.usac.org/e-rate/applicant-process/invoicing/invoice-check/>.

k. Service providers must comply with the FCC rules for Lowest Corresponding Price ("LCP"). Further details on LCP may be obtained at USAC's website: <https://www.usac.org/e-rate/service-providers/step-2-responding-to-bids/lowest-corresponding-price/>.

l. Service providers must not propose any equipment or services produced or provided by companies, their parents, affiliates, and subsidiaries, found to pose a national security threat to the integrity of communications networks or the communications supply chain as required by FCC rules. See <https://www.usac.org/about/reports-orders/supply-chain/>. Any proposed solution including Covered Equipment or Services as defined by the FCC will be disqualified. If, after award of the project it is found Covered Equipment or Services are included, the award and/or Agreement will be considered to be null and void. See <https://www.fcc.gov/supplychain>.

m. SPAM and/or robotic responses will not be considered valid Proposals and will be disqualified from consideration.

n. Any Service Provider proposals identifying contingency fees such as allocations for change orders, tariffs, or other speculative fees not specifically called out for in the scope and/or terms of the RFP/RFB/RFQ will automatically be included in the Proposal price and subject to evaluation unless otherwise specified in the RFP/RFB/RFQ. Contingency fees not pre-approved by the Applicant will not be allowed.

### **3) SERVICE PROVIDER ACKNOWLEDGEMENTS**

a. The Service Provider acknowledges that no change in the products and/or services specified in its proposal will be allowed without prior written approval from the Applicant and a USAC service substitution approval with the exception of a Global Service Substitutions. See <https://www.usac.org/e-rate/applicant-process/before-youre-done/service-substitutions/>.

b. The Service Provider acknowledges that all pricing and technology infrastructure information in its Proposal shall be considered as public and non-confidential pursuant to §54.504 (2)(i)(ii).

c. The Service Provider acknowledges that its offer is considered to be the lowest corresponding price pursuant to § 54.511(b). Service Providers found not to be providing Lowest Corresponding Price (LCP) may be required to repay any identified overcharges to USAC. The Service Provider acknowledges that LCP is solely the service provider's responsibility and it will not hold the Applicant liable, or seek reimbursement from any applicant, for any appeals, commitment adjustments or funding recoveries.

d. The Service Provider attests that its offer does not violate the FCC's Supply Chain certifications included in the FCC Form 473. Supply Chain requirements and certifications can be viewed at USAC's Website: <https://www.usac.org/about/reports-orders/supply-chain/>.

e. This offer is in full compliance with USAC's Free Services Advisory <https://www.usac.org/e-rate/applicant-process/competitive-bidding/free-services-advisory/>. There are no free services offered that would predicate an artificial discount and preclude the applicant from paying its proportionate non-discounted share of costs. The Service Provider agrees to provide substantiating documentation to support this assertion should the applicant, USAC, or the FCC request it.

#### **4) STARTING SERVICES/ADVANCE INSTALLATION**

##### **Category 1 Services**

The annual E-rate Funding Year begins on July 1 and expires on June 30 of each calendar year. Regardless of the Agreement's "effective date," E-rate eligible goods and/or services requested in this RFP/RFB/RFQ shall be delivered no earlier than the start of the 2026 funding year (July 1, 2026). If Category 1 services (Telecommunication Services and Internet access) will begin on or shortly after July 1 of a funding year, the service provider, in some cases, may need to undertake some construction and installation work prior to the beginning of that funding year. Within the limitations indicated below, the infrastructure costs of a service provider can be deemed to be delivered at the same time that the associated Category 1 services begin. That is, if services begin on July 1, then the delivery of service provider infrastructure necessary for those services can be considered as also delivered on July 1. However, NO INVOICING can take place prior to July 1 of the associated Funding Year.

##### **Early Funding Conditions**

###### **Category 1**

There are four conditions that must be met in order for USAC to provide support in a funding year for Category 1 infrastructure costs incurred prior to that funding year.

- *Initiation of installation cannot take place before selection of the service provider pursuant to a posted Form 470 and in any event no earlier than six months prior to July 1 of the funding year.*
- *The Category 1 service must depend on the installation of the infrastructure.*
- *The underlying Category 1 service cannot have a service start date prior to July 1 of the funding year.*
- *No invoices can be submitted to USAC for reimbursement prior to July 1 of the funding year.*

For more information, please refer to the FCC Order involving the Nassau County Board of Cooperative Educational Services (DA 02-3365 , released December 6, 2002). This FCC decision only applies to Priority/ Category 1 services (telecommunications services and Internet access).

The complete text can be found at the following URL:

<https://www.usac.org/e-rate/applicant-process/starting-services/advance-installation/>

## **Category 2**

There are two conditions that allow USAC to provide support in a funding year for Category 2 Internal Connections (equipment and services) incurred prior to that funding year.

- *Applicants may seek support for Category 2 eligible services purchased on or after April 1, three months prior to the start of the funding year on July 1. This will provide schools with the flexibility to purchase equipment in preparation for the summer recess and provide the maximum amount of time during the summer to install these critical networks.*
- *No invoices can be submitted to USAC for reimbursement prior to July 1 of the funding year.*

For more information, please refer to the FCC Report and Order and Further Notice of Proposed Rulemaking ([FCC 14-99](#), released July 23, 2014).

It is important to note NO FCC FORM 474 INVOICING can take place before the Funding Commitment Decision Letter is issued, the FCC Form 486 is approved, and/or prior to July 1 of the funding year.

## **5) INVOICING**

a. The Service Provider agrees to bill and receive a portion of the payment for the provisions of goods and services described herein directly from USAC via the FCC Form 474 Service Provider Invoice (SPI). The Applicant will only be responsible for paying its non-discounted share of costs and does not intend to use the BEAR process (FCC Form 472). The maximum percentage the Applicant will be liable for is the pre-discount amount minus the funded amount as shown on the FCC Form 471 Funding Request Number ("FRN") and associated FRN Line Items and any identified ineligible costs. Upon the successful receipt or posting of a Funding Commitment Decision Letter from USAC and submission, certification and USAC approval of FCC Form 486, the Applicant shall pay only the discounted amount beginning with the billing cycle immediately following said approval. Alternatively, should the Applicant decide that it is in the best interest of the Applicant to file an FCC Form 472, the Applicant will inform the Service Provider of its intent.

b. The Service Provider agrees that it will not invoice USAC for equipment or services that have not been delivered to and accepted by the Applicant and installed. If equipment is being drop-shipped to the Applicant and the Applicant is responsible for installing the equipment, the Service Provider may not invoice USAC until equipment is received and accepted by the Applicant.

c. All Service Provider invoicing to USAC must be completed within 120 days from the last day of service. Should the Service Provider fail to invoice USAC in a timely manner, the Applicant will only be responsible for paying its non-discounted share.

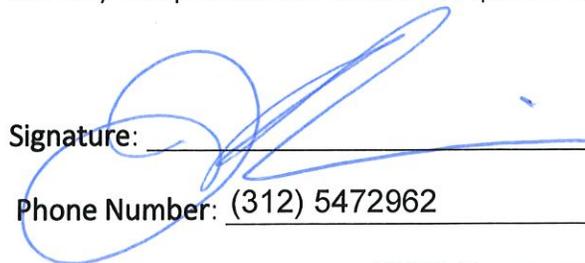
**6) FCC/USAC AUDITS**

The E-rate program requires that all records be retained for at least ten (10) years from the last date of service provided on a particular funding request. The Service Provider hereby agrees to retain all books, records, and other documents relative to any Agreement resulting from this RFP/RFB/RFQ for ten (10) years after final payment. The Applicant, its authorized agents, and/or auditors reserves the right to perform or have performed an audit of the records of the Service Provider and therefore shall have full access to and the right to examine any of said materials within a reasonable period of time during said period.

**7) PROCUREMENT OF ADDITIONAL GOODS AND/OR SERVICES AND AGREEMENT TERM**

During the term of any Agreement resulting from this RFP/RFB/RFQ, the Applicant may elect to procure additional or like goods and/or services offered by the Service Provider. Such services shall be negotiated and obtained via an official amendment to this Agreement and approval by the Applicant's Governing Board. All terms, conditions, warranties, obligations, maintenance and support of said goods or services shall have a coterminous expiration date with the original date of this Agreement. The Applicant shall not enter into a separate Agreement for said goods or services. Service Providers must state in their proposal that they acknowledge, accept and are in agreement with coterminous expiration conditions.

I, the undersigned, as an authorized agent of CDW Government LLC (Service Provider Name), hereby certify that I have read the E-rate Supplemental Terms and Conditions, am fully compliant and intend to cooperate with the E-rate process as outlined above.

Signature:  Title: Manager, Proposals  
Phone Number: (312) 5472962 Email: rebmarc@cdwg.com  
Service Provider Name: CDW Government LLC

Service Provider FCC Registration Number: 0012123287

Service Provider Identification Number: 143005588

# CDW Government Overview

CDW Government LLC (CDW•G) is the wholly owned subsidiary of CDW LLC, a leading multi-brand technology solutions provider to corporate and public sector customers in the U.S., U.K., and Canada.



Founded in 1984, CDW currently employs 14,800 coworkers worldwide. Our broad array of offerings ranges from discrete hardware and software products to integrated IT solutions. Our sales and service delivery teams are organized by segment and geographic regions. We have an expansive network of offices near major cities and a large team of customer-facing coworkers - including field sellers, technology specialists, and advanced delivery engineers - across the country.

CDW's sustainable growth and continued financial stability – growing from \$4 billion net sales in 2001, to \$22.4 billion in 2025 - serve to assure Oak Ridge Schools that we are here to stay and can support you through the life of this contract and beyond.

**We are a trusted partner to more than 15,000 school districts.**

## K-12 Education Expertise

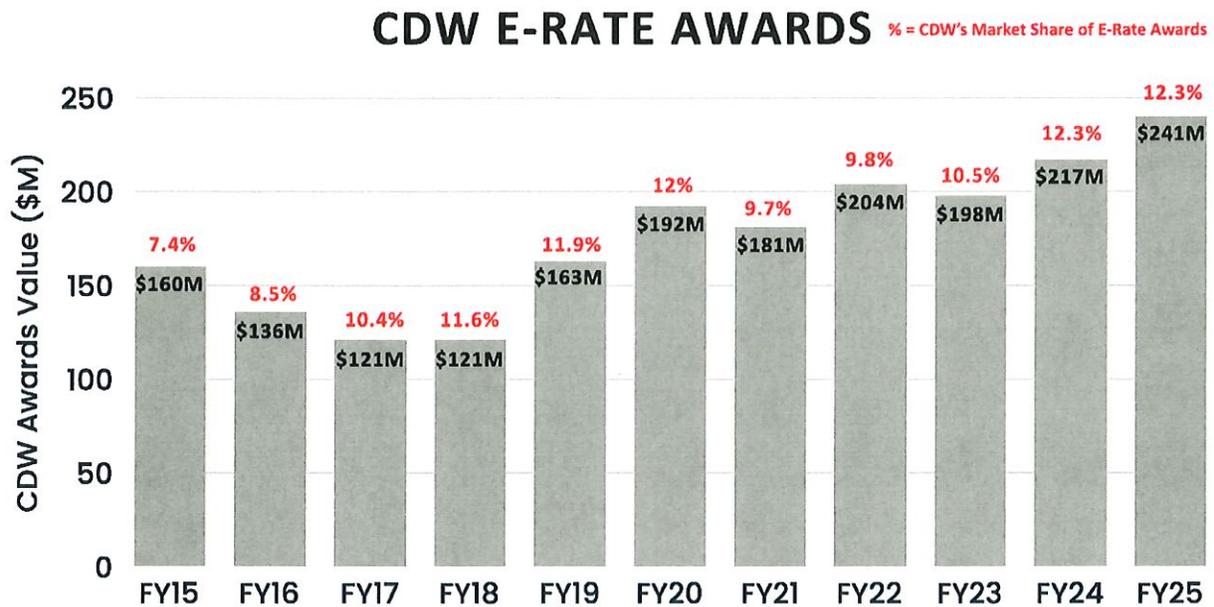
For more than 30 years, CDW Government has helped schools leverage technology to achieve great educational outcomes. With more than **200 government and education contracts**, we are one of the nation's largest direct-response providers of multi-brand technology products and services. We closely monitor emerging technologies to stay at the forefront of innovation and proactively expand our offerings and certifications to support your evolving needs.

Products and Partnerships	Total E-Rate Solutions
<p>More than <b>100,000 products</b> from more than <b>1,000 vendors</b> including leading networking OEMs such as: APC, Cisco, Cradlepoint, Extreme Networks, Fortinet, HPE, Aruba, Juniper, Kajeet, Leibert, Palo Alto, Ruckus, Starlink, and more.</p>	<ul style="list-style-type: none"> <li>▪ <b>Category One</b> <ul style="list-style-type: none"> <li>▪ C1 Network Equipment</li> <li>▪ Wireless Hot Spots and Bus WiFi</li> </ul> </li> <li>▪ <b>Category Two</b> <ul style="list-style-type: none"> <li>▪ Internal Connections</li> <li>▪ Basic Maintenance of Internal Connections</li> <li>▪ Managed Internal Broadband Services</li> </ul> </li> <li>▪ <b>Pilot Program:</b> Cybersecurity</li> </ul>

## A Powerful E-Rate Partner

We have nearly 30 years of experience delivering successful outcomes for E-Rate funded projects. CDW Government has been participating in the E-Rate program since 1998. We are the largest Category 2 provider nationwide, delivering two-times the amount of Category 2 E-Rate projects than our next closest competitor. Since the E-Rate Modernization in 2015, we have been awarded **over 20,816 E-Rate projects totaling over \$1.9B** in equipment delivered to eligible entities throughout the United States.

**Proven Management Approach**



Due to our streamlined and best-practice system of checks and balances, **we have never lost funding for a school**, as substantiated by numerous audits and PIA reviews. Our dedicated internal K-12 and E-Rate resources help ensure accurate invoicing and contract compliance, as well as provide knowledgeable resources and guidance as you navigate your E-Rate journey.

- **E-Rate Program Management Team** offers knowledge, assistance, and advisement, as well as ensures contract compliance.
- **E-Rate Funding Team** ensures expert handling of both BEAR and SPI E-Rate invoicing by accounts receivable specialists.
- **K-12 Education Strategists** focus on helping you implement solutions attuned to your needs, with realistic budget constraints in mind.

## Support Resources for Oak Ridge Schools

When you work with CDW•G, you grow your IT team. Your **dedicated account management resources** work to become trusted members of your team, tailoring a piece of equipment or an entire network to deliver effective and sustainable results.

Account Management Resources	
<b>Rebekah Marco</b> Sr Account Manager (312) 547-2962 rebmarc@cdwg.com	

Our **E-Rate Program Management** team offers eligible entities their knowledge, assistance, and advisement on E-Rate matters, including program compliance. The team prepares contract deliverable reports and makes modifications, as necessary, including price reductions, additions, discontinued products, replacements, and version changes. They ensure that price and supply agreements are in place from award through completion and that the E-Rate bidding, ordering, invoicing, and funding are all seamless and easy for you to complete.

Our **Funding Solutions** team can help E-Rate applicants understand compliance with rules and regulations. They advise on the appropriate engagement after Form 470 filings and work with our operations teams to ensure E-Rate ordering, invoicing, and delivery are compliant. Our E-Rate Team assists applicants with PIA reviews, preparation of Bulk Upload Attachments, and product eligibility reviews as part of the Form 471 process.

Primary E-Rate Resources	
<b>Mandi Maricque</b> Manager, Program Management – K12 224.315.2047 <a href="mailto:amanda.maricque@cdwg.com" style="color: #0070c0;">amanda.maricque@cdwg.com</a>	
Countersignature / Post Award Inbox: <a href="mailto:470Award@cdwg.com" style="color: #0070c0;">470Award@cdwg.com</a>	
Additional E-Rate Resources	
<b>Dave LeNard</b> Business Development Manager, E-Rate	<b>Amy Passow</b> Senior Manager, Education Funding Solutions
<b>Deb Orts</b> Contract Analyst	<b>Kim Lowry</b> Account Receivable E-Rate Invoicing Consultant

# FCC FRN E-Rate Display System Status

The screen shot below is from July 22<sup>nd</sup>, 2025. CDW•G remains in **Green Light Status**.

FCC Registration

FCC > FCC Registration > Manage Existing FRNs > FRN Financial

Logged in As: yolanfa.homeschool@cdw.com | Logout

### FRN Financial

Manage FRNs

FRN Financial

Show 1 to 1 of 1 entries

FRN	FRN Name	Red Light Status	Action
0012123287	CDW Government LLC	Green Light	View/Make Payments

Showing 1 to 1 of 1 entries

Go Back

Info Financials, Admin, Overview Customer Service FCC Info & Policy Feedback, All Statements FCC Home Page

For assistance, please submit a help request at <https://www.fcc.gov/whatsnew/available-support-services/> or call 877-480-3201 (Mon-Fri, 9 a.m.-4 p.m. ET).

Current Version: 3.3.2

Upon request, CDW•G can provide an updated screenshot.

- Spin #143005588
- FCC Registration #0012123287

## Helpful Hints for Preparing Form 471

Things to consider when preparing your funding request (Form 471):

- Enter only one manufacturer part number per line item (do not bundle part numbers)
- All software should be requested under IC, Software
- Even when bundled with warranty support from manufacturer for purchase, as long as warranty cannot be purchased on its own
- If you live in a state that has applicable taxes, such as AR, NC, CA, AZ, WA, make sure to include those taxes on your FCC Form 471.
- If warranty can be purchased separately, then it should be separated for funding request, and warranty funding requested under Basic Maintenance
- Warranty only part numbers should be requested under Basic Maintenance
- List months of service, should only be for coverage July 1 – June 30 (Funding Year)
- List hardware supported part number
- List site where hardware sits
- CDW•G can complete Bulk Submission Forms if chosen as the service provider for your funding request. Please email [E-Rate@cdw.com](mailto:E-Rate@cdw.com) for assistance.

Additionally, **please note** - upon award, to facilitate contract execution with our countersignature, please sign the enclosed E-Rate agreement and send to [rebmarc@cdwg.com](mailto:rebmarc@cdwg.com) and [470award@cdwg.com](mailto:470award@cdwg.com). Please see **E-Rate Order Process** information on the following page for further details.

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# E-Rate Order Process

## Ordering

Purchase orders shall be submitted through electronic means (email, EDI, etc.) directly to Customer's dedicated account manager. Alternatively, if a copy must be sent via mail, common courier, etc., please reach out to your account manager for the appropriate mailing address.

## Required Information

All orders must include:

- Contact name, Phone number
- Purchase order number
- Part number, Product description
- Pre-discount and discounted product price
- Percentage Customer owes and percentage SLD owes (SPI – Form 474 Method)
- Ship to location, Bill to location
- FCC Form 471 Number (also known as Application Number)
- FRN for each part number
- Billing method (BEAR – Form 472 or SPI – Form 474)
- "Net 30 Terms"

**SEPARATE PURCHASE ORDERS SHOULD BE SUBMITTED FOR PRODUCTS THAT ARE NOT ELIGIBLE FOR E-RATE FUNDING. ALL ORDERS ARE SUBJECT TO ACCEPTANCE BY SELLER. PO TOTAL SHOULD REFLECT FULL PURCHASE PRICE OF ORDER.**

## Assistance With Order

Customer may call 1-800-328-4239 for assistance on any purchase order. Any terms or conditions stated in or on the Customer's purchase order which are not consistent with or in addition to the terms and conditions in this Agreement or the Product Sales Terms and Conditions shall be null and void and shall not be applicable hereto or binding on Seller.

**IN THE CASE OF CHANGES TO PRODUCTS AFTER A CUSTOMER ORDER HAS BEEN ACCEPTED BUT BEFORE THE PRODUCT HAS SHIPPED, SELLER WILL MAKE REASONABLE EFFORTS TO MAKE AVAILABLE TO THE CUSTOMER A COMPARABLE OR BETTER PRODUCT AT THE SAME OR LESSER PRICE WHEN OR IF AVAILABLE, UPON APPROVAL FROM SLD ON PRODUCT SUBSTITUTION.**

## Price

Price shall be as stated in the quotation attached hereto as Exhibit I by CDW-G account manager. Prices are exclusive of federal, state, local, or other taxes, which shall be the responsibility of the Customer. Any taxes will be listed separately on the invoice.

## Payment Terms (Customer must choose one)

- a. **Form 474 Service Provider Invoice (SPI) Method:** Seller will invoice Customer for their portion of the Products upon shipment of Product and Customer shall

pay the invoiced amount (non-discounted amount owed by Customer) within thirty (30) days from date of invoice

- b. **Form 472 BEAR Method:** Seller will invoice Customer for pre-discount amount of the Products upon shipment of Product and Customer shall pay the invoiced amount (full amount owed by Customer) within thirty (30) days from the date of invoice.

**Payment Method**

In adherence to Federal E-Rate compliance regulations, CDW-G’s quoted price is all-inclusive of any and all discounts, if applicable. No further discounts will be applied during time of invoice. All payments for both methods shall be submitted to the address presented below WHERE APPLICABLE:

ACH PAYMENT INFORMATION:	CHECK PAYMENT INFORMATION:
E-mail Remittance To: <a href="mailto:gachremittance@cdw.com">gachremittance@cdw.com</a>	CDW Government
THE NORTHERN TRUST	75 Remittance Drive Suite 1515
50 SOUTH LASALLE STREET	Chicago, IL 60675-1515
CHICAGO, IL 60675	
ROUTING NO.: 071000152	
ACCOUNT NAME: CDW GOVERNMENT	
ACCOUNT NO.: 91057	

1. Payment terms are subject to continuing credit approval by Seller. Seller may change credit or payment terms at any time when, in Seller’s opinion, Customer's financial condition, previous payment record, or the nature of Customer's relationship with Seller so warrants.
2. Seller may discontinue performance under this Agreement (i) if Customer fails to pay any sum when due under this Agreement or any other agreement with Seller until payment is received or (ii) if Customer is in violation of applicable regulations.

**NOTWITHSTANDING ANYTHING TO THE CONTRARY, CUSTOMER IS RESPONSIBLE FOR PAYMENT OF 100% THE PRICE OF PRODUCTS IN THE CASE WHERE CUSTOMER PLACES ORDER FOR PRODUCTS SLD DISALLOWS CUSTOMER’S REQUEST FOR DISCOUNT AND REFUSES PAYMENT TO SELLER OF THE DISCOUNT AMOUNT FOR PRODUCTS. IF SLD DISALLOWS CUSTOMER’S REQUEST FOR DISCOUNT CUSTOMER IS IN NO WAY REQUIRED TO PLACE ORDER FOR PRODUCTS.**

# Implementation Plan

## Tasks for First Two Weeks (Sample Version)

Upon award, your Account Management Team will remain in constant contact with key employee(s) at each location to implement the contract and ensure total satisfaction. CDW•G will make this process as seamless as possible and will follow the work plan that has been developed. In addition, if requested, CDW•G will facilitate any necessary meetings via teleconference, videoconference, or in person, pending appointment, at your location or ours, to ensure that the process meets your expectations.

While there can be challenges to implementing a project of any scale, CDW•G tries to minimize potential problems upfront. We will need Oak Ridge Schools to provide the following in a timely manner in order to facilitate the implementation process:

- Updated contact information for all key personnel
- Information regarding product forecasts
- Standardized product list
- List of authorized users and restrictions
- Imaging specifications
- Specific reporting requirements
- Permission for CDW•G to be listed on manufacturer agreements.

During the implementation process, any problems or concerns should be directed to your account manager for immediate resolution. The following implementation plan demonstrates how CDWG will work with you to successfully implement this project.

Task	Week 1	Week 2
<b>Account Management Set Up</b>		
<ul style="list-style-type: none"> <li>• Introduce key customer contacts to CDW•G Account Team</li> <li>• Introductory letter/phone contact/ site visit</li> </ul>	X	
<ul style="list-style-type: none"> <li>• Gather/confirm general customer information</li> <li>• Contacts: phone, email, fax</li> <li>• <b>Oak Ridge Schools's</b> locations and addresses</li> </ul>	X	
<ul style="list-style-type: none"> <li>• Outline customer's procedures and requirements, i.e.               <ul style="list-style-type: none"> <li>○ Frequency of contact/schedule</li> <li>○ Turnaround expectations (quotes)</li> <li>○ Reporting</li> </ul> </li> </ul>	X	
<ul style="list-style-type: none"> <li>• Conduct walkthrough or webinar: Account Center</li> </ul>		X

<b>CDW•G Capabilities and Support</b>		
• Make contact with Account Specialists, as needed		X
• Review technical support options	X	
• Review customer service processes (i.e., returns)	X	
<b>Customer Financial Arrangements</b>		
• Complete forms for credit approval	X	
• Complete financing application		X
<b>Product Specific Needs and Services</b>		
• Arrange conference call(s) with manufacturer(s)	X	
• Develop product forecasts	X	
• Process and test image(s)		X
• Customize asset tag/schedule asset tagging		X
• Input customer installation/configuration specifications		X
<b>Procurement and Management Systems</b>		
• Standardize products through your Account Center		X
• Create bundles		X
• Set up purchase authorizations and controls		X
• Establish account linking		X
• Set up software license tracking system		X
• Implement asset tracking system		X
• Investigate or link with e-procurement programs and third parties		X
• Utilize EDI for invoicing and/or ordering functions		X
<b>Pricing</b>		
• Have CDW•G listed on all manufacturer contracts		X
• Enter pricing information into contract management system		X
<b>Optional Systems/Services</b>		
• Finalize staging agreement		X
• Finalize minority/disabled small business partnership		X
• Arrange for onsite services		X
• Select appropriate training programs		X
• Set up Employee Purchase Program		X

## K-12 Funding and Other Resources

We know your need for vendor support does not stop at deployment completion. Maintaining technology program innovativeness and alignment with your education goals is a continuous and daunting task. In fact, in a year, your program will look very different. You need a vendor that does more than meet your RFP's technology requirements; you need a vendor partner that shares a passion for education and continued development. Our teams, and our partners, are dedicated to supporting the full scope of Oak Ridge Schools's technology and all your program goals. Following are highlights of the value-adds we offer our education customers.

### Get Ed Funding Overview

CDW•G sponsors [GetEdFunding.com](https://www.getedfunding.com), a free grant-finding resource, providing access to billions of dollars' worth of educational funding opportunities. Through sponsoring this resource, CDW•G's mission is to help educators and institutions discover the funds they need to supplement tight budgets to achieve your goals and take learning to the next level.

Monitored daily, [GetEdFunding.com](https://www.getedfunding.com) can reduce the energy your teachers are spending to search for programs and money. You can finetune your search based on key concepts and 21<sup>st</sup> century skills and themes. Once you are registered on the site, you can save the grants of greatest interest to return to later. The funding opportunities listed are already available and applicable to standard learning paths. For example, there are more than 60 STEM specific programs currently available for application. Please reach out to your account manager for more information.





# Oak Ridge

SCHOOLS

Maintenance

Operations

OFFICE OF MAINTENANCE AND OPERATIONS

**DATE: March 12, 2026**

**TO: Jen Laurendine, Executive Director of School Leadership**

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

**SUBJECT: Hydraulic Jack Replacement and Elevator Modernization for JMS**

Ms. Laurendine,

I recommend that the Oak Ridge Schools Board of Education approve a contract with United Elevator Services LLC (Knoxville, TN) in the amount of **\$178,150** for the modernization of the Jefferson Middle School elevator, including replacement of the hydraulic jack. The elevator, installed in the late 1990s, has experienced recurring service issues, and modernization is necessary to ensure reliable ADA-compliant access.

Work will begin immediately following the end of the school year and will be completed before the start of the next academic year. Funding will be allocated from **76100-707 Building Improvements** and distributed across two fiscal years. The project will utilize pricing from **TIPS Contract #25050201**.

Thank you for your consideration,

Allen Thacker

Director of Maintenance and Operations

**Maintenance Office**

100 Woodbury, Oak Ridge, TN 37830

(865) 425-3171

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

**MODERNIZATION PROPOSAL FOR**  
**JEFFERSON MIDDLE SCHOOL**

**200 Fairbanks Road  
Oak Ridge, TN 37830**

**Oak Ridge School Board of Education  
304 New York Avenue  
Oak Ridge, TN 37830**

**TIPS Contract #: 25050201**



**PO Box 1308  
Knoxville, TN 37901  
800.338.0064/865.573.0731  
Job #: 24476-8265  
Date: February 25, 2026  
Alvin Huckaby, Sales Representative**



## Hydraulic Elevator Modernization

### PART 1 GENERAL

#### 1.01 SECTION INCLUDES

- A. Complete labor and materials to modernize **one (1)** existing passenger hydraulic elevator. Elevator work includes:
1. Non-Proprietary microprocessor-based controller and selector system
  2. Non-proprietary door operator and related door equipment
  3. Jack seal
  4. New signal fixtures, car and hall
  5. Power unit to include, pump, motor, control valve and tank
  6. Accessibility provisions for physically disabled persons
  7. Materials and accessories as required to complete the elevator modernization.

#### 1.02 RELATED WORK NOT INCLUDED in this Proposal: Confirm Existing or Provide New **All work listed below must be completed prior to UES manning the project.**

- A. MACHINE ROOM CODE COMPLIANCE – **Confirmed**
- B. ELECTRICAL POWER – **Confirmed**
1. ELECTRICAL DISCONNECTS (Mains)- **Confirmed**
  2. ELECTRICAL DISCONNECTS (Secondary)- **Confirmed**
  3. LIGHTING- **Confirmed**
  4. OUTLETS- **Confirmed**
  5. EMERGENCY POWER REQUIREMENTS – Confirm existing or Provide: If Battery operated emergency operation is provided, a signal (normally closed dry contacts) is required from the main disconnect when power has been removed during maintenance. Appropriate auxiliary contacts with wiring to the controller must be provided by others in the main 3 phase disconnect. A signal (normally closed dry relay contacts) is required from the Fire Alarm System that monitors the heat detectors in the shaft, and machine room. Appropriate auxiliary contacts with wiring to the controller must be provided by others in the Fire Alarm System
- C. FIRE ALARM SYSTEM – Need to confirm that existing system will work with new controls.
- D. SPRINKLERS – None
- E. HEATING AND AIR CONDITIONING – **Confirmed**
- F. DEDICATED TELEPHONE LINE – **Confirmed**
- G. CUTTING & PATCHING – Provide any cutting, patching and painting of walls, floors or partitions (including for hall signals, entrances and/or machine room access) if required.
- H. HOISTWAY LEDGES – **Confirmed**
- I. SUMP – **Confirmed**, however, the electrical outlet for the sump pump in the pit will need to be moved up above the bottom floor level in order to meet current code.
- J. ASBESTOS – Should any asbestos be found to be present in the building which is related to any of our work, it shall be the responsibility of others to abate contain or prepare the workplace as safe for our employees to work within or about. **UES** cannot and will not be responsible for working with asbestos which may be disturbed or uncontained. **UES** cannot and will not be responsible for any costs associated with delay of the job should asbestos be detected or require addressing by others for us to proceed. This includes but is not limited to re-mobilization charges which may be applied.
- K. STORAGE – Provide dry, protected and secure storage space adjacent to the hoistway(s). **UES** shall be compensated for material delivered to the building that is stolen, damaged or removed.
- L. DISPOSAL – If a dumpster is provided on-site, we will deposit waste materials in the dumpster or at an agreed upon on-site location for removal by the owner.
- M. PIT LADDERS – **Confirmed**
- N. OPERATING ELEVATORS FOR OTHER TRADES – If **UES** is required to operate an elevator to facilitate the work of other trades (i.e., sprinklers, smoke sensors, ledges, etc.) then we shall be compensated for this lost time and the project schedule shall also be modified accordingly.

#### 1.03 REQUIREMENTS OF REGULATORY AGENCIES:

- A. Comply with the most-stringent requirements of the following, including all supplements thereto issued and effective at date of bid:



1. Building Laws:
  - a. Applicable Building Laws, including Standard Building Code.
  - b. State and Local Codes, Ordinances and Laws.
  - c. Applicable ASME/ANSI Safety Code for Elevators and Escalators.
  - d. National Electrical Code No. NFPA/ANSI 70.
  - e. NFPA 101 Life Safety Code.
  - f. Americans with Disabilities Act - State of Tennessee handicapped requirements.
2. Permits: Obtain and pay for all State and local permits.

#### 1.04 ADMINISTRATIVE REQUIREMENTS

- A. Pre-installation Meeting: Convene a meeting one week prior to starting work.
  1. Review schedule of installation, installation procedures and conditions, and coordination with related work.
- B. Construction Use of Elevator: Not permitted.

#### 1.05 SUBMITTALS

- A. Administrative Requirements, for submittal procedures.
- B. Shop Drawings: Indicate the following information:
  1. Provide only for signal fixtures.
- C. Product Data: When requested, **UES** will provide signal fixture data to describe product for approval.
  1. Signal and operating fixtures, operating panels, indicators.
  2. Electrical characteristics and connection requirements.
- D. Maintenance Data-Includes:
  1. Owner's Manual with technical information for servicing operating equipment.
  2. Parts catalog with complete list of equipment replacement parts; identify each entry with equipment description and identifying code.
  3. Maintenance Control Plan, one (1) hardcover for machine room, and one (1) thumb drive.
  4. Legible wiring diagrams of installed electrical equipment and changes made in the Work.

#### 1.06 QUALITY ASSURANCE

- A. Perform Work in accordance with applicable code and as supplemented in this section.
- B. All elevator equipment shall be non-proprietary. Any special diagnostic tools necessary for the maintenance of these units shall be turned over to the owner at no additional cost. If tools require periodic adjusting or upgrading the cost of this upkeep will be included under this contract for 20 years at no additional cost to the owner.

#### 1.07 PAYMENT TERMS:

- A. **United Elevator Services, LLC (UES)** quoted price is based on the Down Payment equaling fifty percent (50%) of the initial contract price. Payment of this amount, plus a fully executed subcontract/contract must be received by **UES** before equipment will be released for manufacturing or for scheduling jackhole drilling. The contract price may be reduced or increased only by authorized change order.
- B. **UES** will mobilize after payment of 70% of the remaining balance for delivery of material is received.
- C. Monthly Progress Payments of the remaining balance will be calculated as the work is performed relative to the remaining balance due on this contract (after delivery of materials.) This is to include any materials stored on or offsite. The Owner/Contractor agrees to make progress payments to **UES** for any work performed prior to final execution of the contract and/or the submission of any required documents other than those required for payment applications.
- D. **UES** must be paid in full up to retainage of the final contract price including any change orders prior to scheduling the Inspection by the AHJ and turnover of the elevator equipment.
- E. Final payment/retainage will be due thirty (30) days after final acceptance of the elevator installation, otherwise all warranties and New Installation Service (NIS) will be suspended.
- F. All change orders must be fully executed and paid prior to scheduling final inspection.
- G. Credit card payments are subject to a 3% surcharge.
- H. **UES** will not agree to any language referencing or implying "pay when paid". This contract is between **UES** and referenced owner/contractor is not contingent upon owners/contractor's ability to be paid by others or any other factor or event not described above.
- I. Failure to pay any sum due to **United Elevator Services, LLC** by you related to your equipment described in this agreement within sixty (60) days will be a material breach, regardless of whether it



is billed pursuant to this agreement or any other. We may, at our option, choose to suspend all work until all amounts due have been paid in full. If UES suspends for nonpayment, we shall not be responsible for personal injury, death, damage to property (including elevator equipment) or losses of any other type or kind that is in any way related to the elevator during suspension of work. Upon resumption of work, you will be responsible for payment to **United Elevator Services, LLC** for all costs, if any we incur that result from the suspension work.

**1.08 COORDINATE WITH UES DURING ELEVATOR SCOPE OF WORK AND COMPLETE BEFORE ELEVATOR TEST AND FINAL INSPECTIONS**

- A. ELEVATOR CAB FINISHED FLOORING - NA
- B. CUTTING & PATCHING – Provide any cutting, patching and painting of walls, floors or partitions if required.
- C. OPERATING ELEVATORS FOR OTHER TRADES – If UES is required to operate an elevator to facilitate the work of other trades (i.e., sprinklers, smoke sensors, ledges, etc.) then we shall be compensated for this lost time and the project schedule shall also be modified accordingly.
- D. FIRE, SMOKE, AND/OR COMBUSTION SENSORS – Owner/Contractor is responsible for deactivating and reactivating all fire, smoke and/or combustion sensors in the work area that may be activated by the effects of the operations required to complete this work.
- E. BUILDING PROTECTION - When needed, provide protection for floors, walls, and elevator entrances for normal activities associated with this work. If special drilling or excavation of contaminant material equipment is required, you will be responsible for all building protection and alterations needed to bring this equipment in, use and take off the premises.
- F. SCHEDULING – All "Related Work Not Included" (referenced 1.02 on page 2 of this proposal) must be completed prior to UES scheduling start of work.

**1.09 PERMITS, TESTS, AND INSPECTIONS:**

- A. UES shall be responsible for:
  - 1. All necessary legal requirements, permits, licenses and inspection fees necessary to complete the elevator portion of the installation.
  - 2. Perform acceptance tests as required by the enforcing authorities and/or ASME A17.1 Safety Code for Elevators and Escalators, and in accordance with procedures specified in ANSI/ASME A17.2 Inspector's Manual. Labor, transportation and material to perform test is included in this proposal.
- B. Perform such tests in the presence of the assigned State Elevator Inspector or authorized representatives of the authority having jurisdiction.

**1.10 HOISTING:**

- A. All required hoisting and movement of all elevator equipment shall be the responsibility of UES.

**PART 2 PRODUCTS**

**2.01 MANUFACTURERS**

- A. This proposal is based on non-proprietary products for controllers, signal fixtures, door operators or any other component that would render the equipment proprietary. Non-proprietary is defined as the equipment supplied can be maintained by any qualified elevator contractor, has continuous technical support available to any qualified elevator contractor, and any qualified elevator contractor can purchase electrical and mechanical equipment directly from the manufacturer at the same price.

**2.02 SUMMARY – PASSENGER ELEVATORS: RETAIN EXISTING OR PROVIDE NEW**

**GENERAL**

Elevator Quantity: \_\_\_\_\_ One (1-Simplex)  
 Elevator Scope: \_\_\_\_\_ Modernization of existing elevator  
 Elevator Type: \_\_\_\_\_ Hydraulic  
 ANSI Code Version: \_\_\_\_\_ All material and installation provided in this scope of work to comply with applicable ASME/ANSI codes  
 ADA requirements: \_\_\_\_\_ Provide only as indicated in this scope of work  
 Machine Room Location: \_\_\_\_\_ Retain existing



Loading Class: \_\_\_\_\_ Retain existing (Passenger)  
 Rated Capacity: \_\_\_\_\_ Retain existing (2100 #)  
 Rated Speed: \_\_\_\_\_ Retain existing (100 fpm)  
 Power Characteristics: \_\_\_\_\_ Retain existing (460 volts, 3 Phase, 60 Hz)  
 Travel: \_\_\_\_\_ Retain existing  
 Landings: \_\_\_\_\_ Retain existing (3 stops)  
 Floors served: \_\_\_\_\_ Retain existing (1,2,3)  
 Front Openings: \_\_\_\_\_ Retain existing (2)  
 Rear Openings: \_\_\_\_\_ Retain existing (1)  
 Overhead: \_\_\_\_\_ Retain existing  
 Pit depth: \_\_\_\_\_ Retain existing  
 Clear Hoistway Size: \_\_\_\_\_ Retain existing  
 Car Platform Size: \_\_\_\_\_ Retain existing  
 Clear Car Inside: \_\_\_\_\_ Retain existing  
 Cab Height: \_\_\_\_\_ Retain existing  
 Hoistway & Car Entrance Size: \_\_\_\_\_ Retain existing  
 Hoistway & Car Door Type: \_\_\_\_\_ Retain existing  
 Elevator Permits: \_\_\_\_\_ **Provide** for only elevator portion of the project  
 Elevator Tests / Inspections: \_\_\_\_\_ **Provide** as required  
 Warranty Period: \_\_\_\_\_ **Provide** Twelve (12) months from date of Final  
 Acceptance  
 Maintenance & Callback Service: \_\_\_\_\_ Continue with existing maintenance agreement

**MACHINE ROOM**

Power Unit: \_\_\_\_\_ **PROVIDE NEW** submersible power unit  
 Hydraulic Fluid: \_\_\_\_\_ **PROVIDE NEW**  
 Piping: \_\_\_\_\_ **PROVIDE NEW** as needed  
 Elevator Controller: \_\_\_\_\_ **PROVIDE NEW** non-proprietary, microprocessor-based  
 controller, for simplex automatic operation  
 Emergency Battery Lowering: \_\_\_\_\_ **PROVIDE NEW**  
 Wiring: \_\_\_\_\_ **PROVIDE NEW**  
 Non-Proprietary Operation: \_\_\_\_\_ **PROVIDE NEW** on-board service tool

**HOISTWAY AND PIT**

Hydraulic Jack Assembly: \_\_\_\_\_ **PROVIDE NEW in separate proposal**  
 Hydraulic Jack Seal: \_\_\_\_\_ **PROVIDE NEW in separate proposal**  
 Guide Rails/Brackets/Supports: \_\_\_\_\_ Retain existing  
 Seismic Requirements: \_\_\_\_\_ **PROVIDE NEW** (rupture valve) **in separate proposal**  
 Traveling Cable: \_\_\_\_\_ **PROVIDE NEW**  
 Selector System: \_\_\_\_\_ **PROVIDE NEW**  
 Hoistway Wiring: \_\_\_\_\_ **PROVIDE NEW**  
 Hoistway Switches: \_\_\_\_\_ Retain existing terminal limits  
 Pit Channels: \_\_\_\_\_ Retain existing  
 Spring Buffers: \_\_\_\_\_ Retain existing  
 Pit Stop Switch: \_\_\_\_\_ **PROVIDE NEW**

**LANDINGS**

Hoistway Entrances Doors: \_\_\_\_\_ Retain existing  
 Hoistway Entrance Frames: \_\_\_\_\_ Retain existing  
 Hoistway Entrances Sills: \_\_\_\_\_ Retain existing  
 Hoistway Entrances Sill Support Angles: \_\_\_\_\_ Retain existing  
 Entrance Fascia, Toe Guards: \_\_\_\_\_ Retain existing  
 Entrance Dust & Hanger Covers: \_\_\_\_\_ Retain existing  
 Entrance Struts & Headers: \_\_\_\_\_ Retain existing  
 Hoistway Door Safety: \_\_\_\_\_ Retain existing  
 Hoistway Door Tracks: \_\_\_\_\_ Retain existing  
 Hoistway Door Hangers: \_\_\_\_\_ Retain existing  
 Hoistway Door Rollers: \_\_\_\_\_ **PROVIDE NEW**  
 HW Door Pick-up Rollers: \_\_\_\_\_ **PROVIDE NEW** as needed



HW Door Eccentrics: \_\_\_\_\_ Retain existing  
Hoistway Door Closers: \_\_\_\_\_ Retain existing  
Hoistway Door Sight Guards: \_\_\_\_\_ Retain existing  
Hoistway Door Interlocks: \_\_\_\_\_ **PROVIDE NEW** as needed  
Hoistway Door Escutcheons: \_\_\_\_\_ Retain existing  
HW Door Unlocking Devices: \_\_\_\_\_ Retain existing  
HW Door Gibs and Fire Tabs: \_\_\_\_\_ **PROVIDE NEW**  
Hall Station Fixtures: \_\_\_\_\_ **PROVIDE NEW** two (2) risers of surface mounted fixtures, with #4 stainless steel finish, at all landings.  
Appendix O – ANSI Code Signage: \_\_\_\_\_ **PROVIDE NEW** incorporated into the new hall stations at all landings.  
Hall Fire Service Devices: \_\_\_\_\_ **PROVIDE NEW** incorporated into the new hall station at the main landing.  
Telephone Line Monitoring: \_\_\_\_\_ **PROVIDE NEW** incorporated into the hall station at the main landing.  
Hoistway Access Key Switch: \_\_\_\_\_ **PROVIDE NEW** at the top and bottom landings  
Hall Braille Designations: \_\_\_\_\_ Retain existing

### CAR

Platform / Inside Size: \_\_\_\_\_ Retain existing  
Car Sling & Platform: \_\_\_\_\_ Retain existing  
Car Platform Fireshield: \_\_\_\_\_ Retain existing  
Car Roller Guides: \_\_\_\_\_ Retain existing  
Emergency Alarm Bell: \_\_\_\_\_ Retain existing  
Top Emergency Exit: \_\_\_\_\_ **PROVIDE NEW** 5 pin lock and electric contact for the existing emergency hatch on car top  
Car Top Inspection Station: \_\_\_\_\_ **PROVIDE NEW**  
Top of Car Light / Duplex Outlet: \_\_\_\_\_ **PROVIDE NEW** with inspection station  
Door Operator: \_\_\_\_\_ **PROVIDE NEW**  
Car Door: \_\_\_\_\_ Retain existing  
Car Door Clutch: \_\_\_\_\_ **PROVIDE NEW**  
Car Door Restrictor: \_\_\_\_\_ **PROVIDE NEW**  
Car Door Protection Devices: \_\_\_\_\_ **PROVIDE NEW** infrared system to replace the existing mechanical edge on front and rear doors.  
Car Door Headers: \_\_\_\_\_ Retain existing  
Car Door Tracks: \_\_\_\_\_ Retain existing  
Car Door Eccentrics: \_\_\_\_\_ Retain existing  
Car Door Hangers: \_\_\_\_\_ Retain existing  
Car Door Rollers: \_\_\_\_\_ **PROVIDE NEW**  
Car Door Gate Switch: \_\_\_\_\_ **PROVIDE NEW** with door operator  
Car Enclosures (Structural Cab Walls & Top): \_\_\_\_\_ Retain existing  
Cab Panels: \_\_\_\_\_ Retain existing  
Ceiling: \_\_\_\_\_ Retain existing  
Car Riding Lanterns: \_\_\_\_\_ **PROVIDE NEW** two (2) surface mounted fixtures. One (1) in the car front return jamb, and one (1) in the rear return jamb, with #4 stainless steel finish.  
Car Operating Panel: \_\_\_\_\_ **PROVIDE NEW** with #4 stainless steel panel mounted in the cab front return. To include signage for capacity, elevator number, and no smoking international symbol.  
Car Position Indicator: \_\_\_\_\_ **PROVIDE NEW** digital PI incorporated in the new car operating panel.  
Car Emergency Light: \_\_\_\_\_ **PROVIDE NEW** incorporated in the new car operating panel.  
Car Operating Devices: \_\_\_\_\_ **PROVIDE NEW** alarm, door open & door close pushbuttons, and emergency stop, light, 2-speed fan, independent service, & access enable key switches, and Fire Service indicator incorporated in the new car operating panel.



- Car Floor Pushbuttons: \_\_\_\_\_ **PROVIDE NEW** incorporated in the new car operating panel.
- Car Braille Designations: \_\_\_\_\_ **PROVIDE NEW** incorporated in the new car operating panel.
- Hands Free ADA Phone: \_\_\_\_\_ **PROVIDE NEW** incorporated in the new car operating panel.
- Car Fire Service Cabinet, Devices: \_\_\_\_\_ **PROVIDE NEW** incorporated in the new car operating panel with Instructional Signage
- Certificate Frame: \_\_\_\_\_ **PROVIDE NEW**

### **PART 3 EXECUTION**

#### **3.01 EXAMINATION**

- A. Before starting elevator modernization, inspect hoistway, hoistway openings, pits and machine rooms/control space, as constructed and verify all critical dimensions, and examine supporting structures and all other conditions under which elevator work is to be installed. Do not proceed with elevator modernization until unsatisfactory conditions have been corrected in a manner acceptable to the installer.
- B. Verify that electrical power is available and of the correct characteristics.
- C. Modernization constitutes acceptance of existing conditions and responsibility for satisfactory performance.

#### **3.02 DELIVERY, STORAGE AND HANDLING**

- A. **UES** will deliver elevator materials, components and equipment and the contractor is responsible for providing secure and safe storage on job site.

#### **3.03 PREPARATION**

- A. Owner/contractor to provide required electrical power for installation work and testing of elevator components.
- B. Owner/contractor to provide crane if required and for any additional permits, street closings, and traffic management.

#### **3.04 INSTALLATION**

- A. Install/Modernize elevator systems components.
  - 1. Work shall be performed by **UES** personnel in accordance with ASME A17.1, manufacturer's installation instructions and approved shop drawings.
  - 2. Comply with the National Electrical Code for electrical work required during installation.
- B. Coordination: Coordinate elevator work with the work of other trades, for proper time and sequence to avoid project delays.

#### **3.05 ERECTION TOLERANCES**

- A. Guide Rail Alignment: Adjust as needed in accordance with ASME A17.1.
- B. Cab Movement on Aligned Guide Rails: Smooth movement, with no objectionable lateral or oscillating movement or vibration.

#### **3.06 FIELD QUALITY CONTROL**

- A. Acceptance testing: Upon completion of the elevator modernization and before permitting use of elevator, perform acceptance tests as required by A17.1 Code and local authorities having jurisdiction. Perform other tests, if any, as required by governing regulations or agencies.
  - 1. Advise Owner, Contractor, Architect, and governing authorities in advance of dates and times tests are to be performed on the elevator.
  - 2. Obtain permits required to perform tests.
  - 3. Furnish test and approval certificates issued by authorities having jurisdiction.

#### **3.07 ADJUSTING**

- A. Make necessary adjustments of operating devices and equipment to ensure elevator operates smoothly and accurately.
- B. Adjust for smooth acceleration and deceleration of car so not to cause passenger discomfort.
- C. Adjust automatic floor leveling feature at each floor to achieve 1/4 inch from flush.



**3.08 CLEANING**

- A. Before final acceptance, remove protection from finished surfaces and clean and polish surfaces in accordance with manufacturer's recommendations for type of material and finish provided. Stainless stall shall be cleaned with soap and water and dried with a non-abrasive surface; shall not be cleaned with bleached-based cleansers.
- B. At completion of elevator work, remove tools, equipment, and surplus materials from site. Clean equipment rooms and hoistway. Remove trash and debris.

**3.09 PROTECTION**

- A. Prohibited Use: Elevators shall not be used for temporary service or for any other purpose during the construction period before Substantial Completion and acceptance by the purchaser unless agreed upon by **UES** and Owner/Contractor with signed temporary agreement. Do not permit construction traffic within cab after cleaning.
- B. At time of Substantial Completion of elevator work, or portion thereof, provide suitable protective coverings, barriers, devices, signs, or other such methods or procedures to protect elevator work from damage or deterioration. Maintain protective measures throughout remainder of construction period.

**3.10 DEMONSTRATION**

- A. Instruct Owner's personnel in proper use, operations, and daily maintenance of elevators. Train Owner's personnel in normal procedures to be followed in checking for sources of operational failures or malfunctions.
- B. Make a final check of each elevator operation, with Owner's personnel present, immediately before date of substantial completion. Determine that control systems and operating devices are functioning properly.

**3.11 WARRANTY**

- A. Submit elevator manufacturer's standard written warranty agreeing to repair, restore or replace defects in elevator work materials and workmanship not due to ordinary wear and tear or improper use or care for 12 months after completion of installation or acceptance thereof by beneficial use, whichever is earlier.

**3.12 MAINTENANCE**

- A. Continue with existing maintenance agreement

**PART 4 PRICING**

**4.01 PRICING**

Schedule of Values		
Contract Number	24476	
Base Contract Amount		\$108,440
Number of units		1
Due Date	Description	Value
Upon Issuance of PO/Contract	50%	\$ 54,220.00
Upon Delivery of Material	70% of Remaining Balance	\$ 37,954.00
Upon Substantial Completion of 1st	100 % of remaining balance	\$ 16,266.00



## Signature Page

Our proposal amount is:

**One Hundred Eight Thousand, Four Hundred Forty and 00/100 Dollars (\$108,440.00)**

This quotation **expires after thirty (30) days** unless arrangements to extend the quotation time frame are approved in writing. **In order to avoid price escalations due to the current issues in the supply chain, jobs must be released into fabrication within 6-8 weeks from contract execution for shipment per the following lead times.** You, as the purchaser, are responsible for providing at no cost to UES suitable, dry and secure storage for the equipment at the job site until the building is ready for installation. Our current lead-time for equipment is typically **10 to 12 weeks** after release of all approvals and is subject to change. This quotation is submitted with the understanding that any contract resulting therefrom will be subject to review and mutual acceptance of all terms and conditions contained herein. Our quotation is based on all work performed during regular working hours of the elevator trade.

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All material is guaranteed to be as specified. All work to be completed in a workmanlike manner according to standard practices. Any alteration or deviations from above specifications involving extra costs will be executed only upon written orders and will become an extra charge over and above the estimate. All agreements contingent upon strikes accidents or delays beyond our control. Owner to carry fire, tornado, and other necessary insurance. Our workers are fully covered by Workmen's Compensation Insurance  
**NOTE:** This proposal may be withdrawn by us if not accepted within 30 days.

Submitted by: *Alvin Huckaby*  
Alvin Huckaby, Knoxville Branch

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Acceptance of Proposal-The prices, specifications and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payment will be made as outlined above.

Customer Authorized Representative:

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

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

Accepted for United Elevator Services LLC

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

Print Name: \_\_\_\_\_



## Contract Clause

### Warranty

United Elevator Services, LLC warrants any equipment it installs as described in this proposal against defects in material and workmanship for a period of one (1) year from the date Purchaser's execution of United Elevator Services, LLC's "Final Acceptance Form." This is made on the on the express conditions that all payments made under this installation agreement and all change orders and have been paid in full. Warranty is contingent on the equipment being currently serviced by United Elevator Services, LLC. No warranties which extended beyond the description in this proposal, nor are there any warranties, expressed or implied, by operation of law or otherwise nor is there a warranty of merchantability. This warranty is not intended to supplant normal maintenance service and shall not be constructed to mean that United Elevator Services, LLC will provide free service to periodic examination, lubrication, tests, or adjustment, nor will United Elevator Services, LLC correct, without a charge. Any problems that arise from normal wear and tear or abuse, misuse, improper or inadequate maintenance, or any other causes other than defective material or workmanship are not covered. In order to make a warranty claim, purchaser must give United Elevator Services, LLC prompt written notice. United Elevator Services, LLC shall, at its own expense correct any proven defect by repair or replacement. United Elevator Services, LLC will not, under any circumstances, reimburse purchaser for cost of work done by others, nor shall we be responsible for the performance of any equipment that has been the subject of service, repair, replacement, revisions or alternations by others. If there is more than one (1) unit which is the subject of work described in this proposal, this clause shall apply separately to each unit as accepted. Should our start of work be delayed for a period greater than six (6) months from the agreed upon delivery, the warranty shall be reduced by the amount of the delay.

### Indemnification and Limits of Liability

In consideration of **UES** performing the services herein specified, Customer expressly agrees to indemnify, defend, save harmless, discharge, release and forever acquit **UES**, its employees, officers, agents, affiliates, and subsidiaries from and against any and all claims, demands, suits, and proceedings brought against **UES**, its employees, officers, agents, affiliates and subsidiaries for loss, property damage (including damage to the equipment which is the subject matter of this Agreement), personal injury or death that are alleged to have been caused by the Customer or any others in connection with the presence, use, misuse, maintenance, installation, removal, manufacture, design, operation or condition of the equipment covered by this Agreement, or the associated areas surrounding such equipment. Customer's duty to indemnify does not apply to the extent that the loss, property damage (including damage to the equipment which is the subject matter of this Agreement), personal injury or death is determined to be caused by or resulting from the sole negligence of **UES** and/or its employees. Customer recognizes that Customer's obligation to **UES** under this clause includes payment of all fees, court costs, judgments, settlements, interest and any other expenses of litigation arising out of such claims or lawsuits. In consideration of the performance of the services and the furnishing of the materials as specified above at the price stated, Customer acknowledges and agrees that **UES** assumes no liability on the account of accidents to persons or damage to persons or property; and that Customer's owns the responsibility for damage to persons or property while riding on or being in or about the elevators referred to in this Agreement is in no way mitigated or abated.

United Elevator Services, LLC.

Post Office Box 1308  
Knoxville, TN 37901  
V: 865.573.0731  
F: 865.573.0867



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## FIXED PRICE PROPOSAL

TIPS Contract #: 25050201

**TO: Oak Ridge School Board of Edu.**  
**304 New York Ave.**  
**Oak Ridge, TN 37830**

**JOB: Jefferson Middle School**  
**200 Fairbanks Rd.**  
**Oak Ridge, TN 37830**

**REF: Jack Replacement**

**ESTIMATE #: 25774-8322**

**DATE: February 25, 2026**

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We are submitting to you for your consideration, the following proposal to:

Replace existing complete hydraulic jack assembly. The new jack casing will be installed with a dielectric barrier (PVC) (spacing permitted) as required by Code. All work is being performed in accordance with ASME/ANSI A17.1 Elevator Code, Section 3.18.

### **SCOPE OF WORK:**

- Install safety barricades in front hoistway entrances where applicable.
- Hoist elevator to the top of shaft and tie off to the hoist beam and rails.
- Shut off oil line in pit to prevent loss of oil during work.
- Remove hydraulic piston (plunger)
- Remove the buffers, hydraulic line, shut off valve, and pit channels from pit.
- Remove concrete around the jack head to remove the jack and clean the hole.
- Pump out any remaining oil fluid from the cylinder and stored in 55-gallon drums.
- Remove the existing cylinder, cutting into sections, as necessary, for removal from hoistway.
- Install Jack-It protective casing that includes a means of monitoring for corrosive moisture.
- Install new hydraulic cylinder, including new jack head with double bulkhead bottom made of steel pipe compliant with Elevator Safety Code ASME Code A17.1, with the same I.D. and O.D. size as existing cylinder.
- If necessary, replace concrete pit floor with fast drying hydraulic concrete.
- Install hydraulic plunger into new cylinder and plumb jack within 1/8" tolerance.
- Re-install all pit equipment including hydraulic pipe, shutoff valve, buffers and pit channels.
- Install new seals and gaskets in the jack head.
- Attach new plunger to the platen plate on the bolster channel of the elevator and align for proper operation.
- Provide new hydraulic fluid as needed to the elevator hydraulic system, up to 110 gallons, and test for normal operation.
- If needed, adjust valve for proper operation and ride quality.
- Remove all tools, material, and spoils, and clean work areas.
- Perform Full Load Safety Test.
- Return elevator to service after final payment has been made.

United Elevator Services, LLC.

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- State permit will be obtained and purchased by United Elevator Services

**NOTE:**

**Please pay close attention to page 4 of this proposal in regard to potential problems related to the jack hole.**

We propose hereby to furnish labor and material - in accordance with above and conditions herein,  
For the sum of: **Sixty-nine Thousand, Seven Hundred Ten and 00/100's Dollars (\$69,710.00)**  
Payable as follows: 50% with order, net on completion prior to turnover for passenger use.

All material is guaranteed to be as specified. All work to be completed in a workmanlike manner according to standard practices. Any alteration or deviations from above specifications involving extra costs will be executed only upon written orders and will become an extra charge over and above the estimate. All agreements contingent upon strikes accidents or delays beyond our control. Owner to carry fire, tornado, and other necessary insurance. Our workers are fully covered by Workmen's Compensation Insurance  
**NOTE:** This proposal may be withdrawn by us if not Accepted within 30 days.

Submitted by: *Alvin Huckaby*  
Alvin Huckaby Sales Representative

Acceptance of Proposal - The prices, specifications and conditions are satisfactory and are hereby accepted. You are authorized to do the work as specified. Payment will be made as outlined above.

Printed Name: \_\_\_\_\_ Signature \_\_\_\_\_ Date: \_\_\_\_\_

Accepted for United Elevator Services LLC  
Signature: \_\_\_\_\_

\_\_\_\_\_ Date: \_\_\_\_\_  
UES Representative

# United Elevator Services, LLC.

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## UNITED ELEVATOR SERVICES TERMS AND CONDITIONS

Quotations are subject to change without notice.

You agree to pay, as an addition to the price herein quoted, the amount of any tax based upon the transfer, use, ownership or possession of the equipment, imposed by any law enacted after the date of this proposal or imposed upon you by any existing law.

Monthly progress billings will be made by UNITED ELEVATOR SERVICES, LLC to cover materials shipped and labor expended during the month. Customer payments shall become due and payable within 30 days after receipt of such progress billings. In the event that payments are not made within 30 days, interest will be charged at a rate of 1.5% per month on the unpaid amount until payment is received.

We reserve the right to discontinue our work at any time until progress payments have been made as agreed.

Final payment shall become due and payable when all of the work described in this contract has been completed.

The completion of work or delivery of material specified in this agreement is subject to delays caused directly or indirectly by embargoes, strikes, lockout, common carriers, and accidents or by any other similar or dissimilar cause beyond our control, for which we are to be held harmless.

Should conditions develop beyond our control, making the building or premises in which our men are working, dangerous, we reserve the right to discontinue our work until such dangerous conditions are corrected.

Should damage occur to our material or work on the premises, where our work is to be or is being performed, by fire, theft, or otherwise, the purchaser is to compensate United Elevator Services, LLC for said damage.

It is expressly understood, in consideration of our performance of the service enumerated at the price stated, that the purchaser assumes all liability for injury, including death, to any person or persons and for damage to property or loss of use thereof, on account of or resulting from the performance of the work to be done hereunder, and agrees to defend, indemnify and hold harmless our company, its officers, directors and employees from all damages, except that resulting from the sole negligence of UNITED ELEVATOR SERVICES, LLC.

UNITED ELEVATOR SERVICES, LLC shall not be responsible or liable for any damages, claims, suits, expenses and payments on account of or resulting from any injury, death or damage to property arising or resulting from overloading above the rated capacity of passenger, freight or service elevator or any other device covered by this agreement.

Unless otherwise agreed, it is understood that the work shall be performed during regular working hours or regular working days of the elevator trade, unless otherwise noted herein. If overtime work is mutually agreed upon and performed, the additional price, at our usual rates for such work, shall be added to the contract price herein named.

The machinery, implements and apparatus furnished hereunder remain our personal property and we retain title thereto until final payment is made, with the right to retake possession of the same at the cost of the purchaser if default is made in any of the payments, irrespective of the manner of attachment to the realty, the acceptance of notes, or the sale, mortgage or lease of the premises.

In states requiring notice prior to filing a lien, this notice requirement is hereby complied with.

You agree to pay a late charge from the date such sums become due of one and one-half percent (1.5%) per month, or the highest legally permitted rate, whichever is less, on any balance due for more than their (30) days, together with all costs (including but not limited to, court costs, attorney's fees, or collection costs) incurred by United Elevator Services, LLC to collect overdue amounts.

Failure to pay any sum due to United Elevator Services, LLC by you related to your equipment described in this agreement within sixty (60) days will be a material breach, regardless of whether it is billed pursuant to this agreement or any other. We may at our option choose to suspend all work until all amounts due have been paid in full. If United Elevator Services LLC suspends for non-payment, we shall not be responsible for personal injury, death, damage to property (including elevator equipment) or losses of any other type or kind that is in any way related to the elevator during suspension of work. Upon resumption of work, you will be responsible for payment to United Elevator Services LLC for all costs, if any we incur that result from the suspension work.

United Elevator Services, LLC.

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### JACK HOLE CLARIFICATIONS (HOLE CLAUSE)

The scope of work outlined in our proposal is based on the following assumptions:

1. Our excavation of the jack hole to accommodate the new hydraulic cylinder assembly is based on encountering soil free of rocks, boulders, building construction members, sand, **ground water**, quicksand, or cave-in, underground caves, and/or any other physical obstructions, hindrances, or unusual conditions. If we encounter any of these conditions, you agree to provide us with written authorization for us to proceed with this portion of the work and for us to be reimbursed, according to the terms of this proposal, for all additional costs associated with this change in our scope of work.

### REMOVAL AND DISPOSAL OF EXCAVATION SPOILS

1. Price includes disposal up to 440 gallons of contaminated soil and fluid. If it is necessary to remove additional materials, there will be an additional charge.

### REIMBURSEMENT FOR CHANGES IN OUR SCOPE OF WORK

If the actual project conditions (hole collapses, water, building members, ground pressure etc...) or your decisions require us to execute our scope of work differently from any portion of the scope of work stated in this proposal, you agree to:

1. Provide written authorization for us to proceed with that portion of the work.
2. Grant us an extension in project completion time above and beyond that stated in this proposal.
3. **Reimburse us for all additional costs incurred, subsequent to or as a result of our encountering the change in our scope of work, on a time and material basis at a rate of \$600 per hour.**



School: Oak Ridge High School

Club Name: Velocity XL Sponsor: Dr. Patrick LaDue

Club Membership: Students, teachers, interested aircraft enthusiasts

Selection of Officers: Quorum vote of members (Quorum) - 1/3

Club Purpose:

Promote aviation understanding via building life-size kit aircraft for eventual flight

Club Activities:

Exploration of aircraft building methods and techniques via hands-on build projects

Club Meeting Times:

3pm on Wednesdays until 7pm (later if food is provided for the evening meal)

Club Funding:

Materials are inherently present via funding of the aviation side of Auto/Aviation technology courses. What we need most is human investment through hours of building time.

Rules and Regulations:

Standard district rules of teacher/student/assistant background checks required. Attendance on Wednesday or other agreed upon day to complete aircraft build work.

Other Pertinent Information:

A hanger is already in place where a kit aircraft is in the buildup phase. A turboprop aircraft engine is desired to power the craft. The propeller is to be installed in place once the aircraft reaches its maiden flight destination. Other materials and services (upholstery, etc.) will be required when the time comes.

Student Representative: Kyle Blake (ORHS Sophomore)

Building Administration Approval: Katherine Elizabeth Fisher Digitally signed by Katherine Elizabeth Fisher Date: 2026.02.13 08:24:10 -05'00' Date: \_\_\_\_\_

Date Student Council Reviewed (ORHS Only): 2/19/26 (Ashley Wagner) Date BOE Approved: \_\_\_\_\_

Will participants engage in physical activities requiring a health or sports physical?  Yes  No

Physical Exam Required:  Yes  No



School: Oak Ridge High School

Club Name: National Technical Honors Society Sponsor: Keith Jackson

Club Membership: Sophomores, Juniors, and Seniors on a CTE pathway, participating in multiple CTE classes or in a CTE club

Selection of Officers: President, Vice President, Secretary, Reporter elected by members

Club Purpose:

The National Technical Honor Society is an educational non-profit that exists to honor, recognize, and empower students and teachers in Career & Technical Education. The mission of the National Technical Honor Society is to advocate for and empower all students to pursue the skills needed to build their careers and the global workforce.

Club Activities:

Our NTHS chapter would share and honor our students technical accomplishments from in and outside of class through social media and student made portfolios, hoping to empowering our members and younger generations to pursue their passions in a technical field. We would participate in STEM night, exemplifying a large verity of student made projects, and share information about technical events where students could learn more about their desired field.

Club Meeting Times:

One meeting would be held at the beginning of the year to welcome new members and discuss expectations, as well as, at the end of the year to celebrate the end of another school year and our members accomplishments. Additional meetings would be held as needed to discuss upcoming events or opportunities after school hours.

Club Funding:

All club funding would come from student dues for joining the club and fundraisers. Any students not able to pay dues will receive sponsorship.

Rules and Regulations:

To become a member of NTHS, the student must have a CTE major, participate in a CTE program, or have CTE based coursework, as well as, a minimum of a 3.0 unweighted GPA, both overall and CTE specific. The student also must be in good standing, meaning, minimal discipline offenses. These requirements would be checked as the students apply each year. All members eligibilty would be reviewed on an annual bases.

Other Pertinent Information:

The National Technical Honors Society gives access to around \$300,000 in scholarships each year, and provides personalized letters of recommendation for employment, admissions and scholarships. NTHS also has membership add-ons, like the NTHS Career Readiness Portal, which allows students to explore career paths, earn micro-credentials, search for over \$7 billion in scholarships, and connect with employers.

Student Representative: Hailey Moore

Building Administration Approval: Beth Fisher Digitally signed by Beth Fisher Date: 2026.02.24 14:53:28 -05'00' Date: \_\_\_\_\_

Date Student Council Reviewed (ORHS Only): 2/12/26 - A. Wagner Date BOE Approved: \_\_\_\_\_

Will participants engage in physical activities requiring a health or sports physical?  Yes  No

Physical Exam Required:  Yes  No



School: Robertsville Middle School

Club Name: RMS Taylor Swift Club Sponsor: Debbie Smith & Courtney Bowers

Club Membership: 5th - 8th graders

Selection of Officers: Nominations and Voting

Club Purpose:

The club is a welcoming community where Taylor Swift fans gather to celebrate their shared love of her music, artistry, and storytelling. Members express their fandom through singing, dancing, making friendship bracelets, and creating meaningful connections with fellow fans. Work on Communication & Expression, Social & Emotional Learning, and Critical Thinking & Literacy. Club Values: • Inclusivity • Creativity • Friendship • Self-Expression • Emotional Connection • Celebration

Club Activities:

Build confidence in verbal expression by sharing thoughts, feelings, and interpretations of Taylor Swift's music and lyrics, Develop written expression skills through journaling, creative writing, and reflective assignments inspired by her work, Practice public speaking by presenting song analyses, sharing personal stories, or performing in front of peers Strengthen friendship-building skills by collaborating on creative projects and supporting one another in a judgment-free environment, Develop emotional intelligence by exploring how Taylor Swift's lyrics reflect complex emotions and relatable human experiences, Build empathy and understanding by listening to how different members connect with her music. Make meaningful connections between lyrics and literature, history, and personal experiences, Analyze storytelling techniques and narrative themes across her albums. Reflect on how music can capture and validate emotions across different life situations

Club Meeting Times:

For the remainder of this school year select Mondays after school until 4:30. For next year, 1-2 Mondays a month, subject to student availability.

Club Funding:

We do not anticipate any this school year. Going forward, we will explore small fundraisers to purchase supplies by selling club t-shirts, friendship bracelets, or a voluntary donation to the club.

Rules and Regulations:

RMS handbook & rules

Other Pertinent Information:

We will be using the clean version of all albums with explicit lyrics.

Student Representative: Lilly Phillips, Dakota Robach, Adaliene Tisdale, Lucas Dean, Chloe Nelson

Building Administration Approval: Brian Tinker Digitally signed by Brian Tinker Date: 2026.03.16 09:54:20 -04'00' Date: \_\_\_\_\_

Date Student Council Reviewed (ORHS Only): \_\_\_\_\_ Date BOE Approved: \_\_\_\_\_

Will participants engage in physical activities requiring a health or sports physical?  Yes  No

Physical Exam Required:  Yes  No

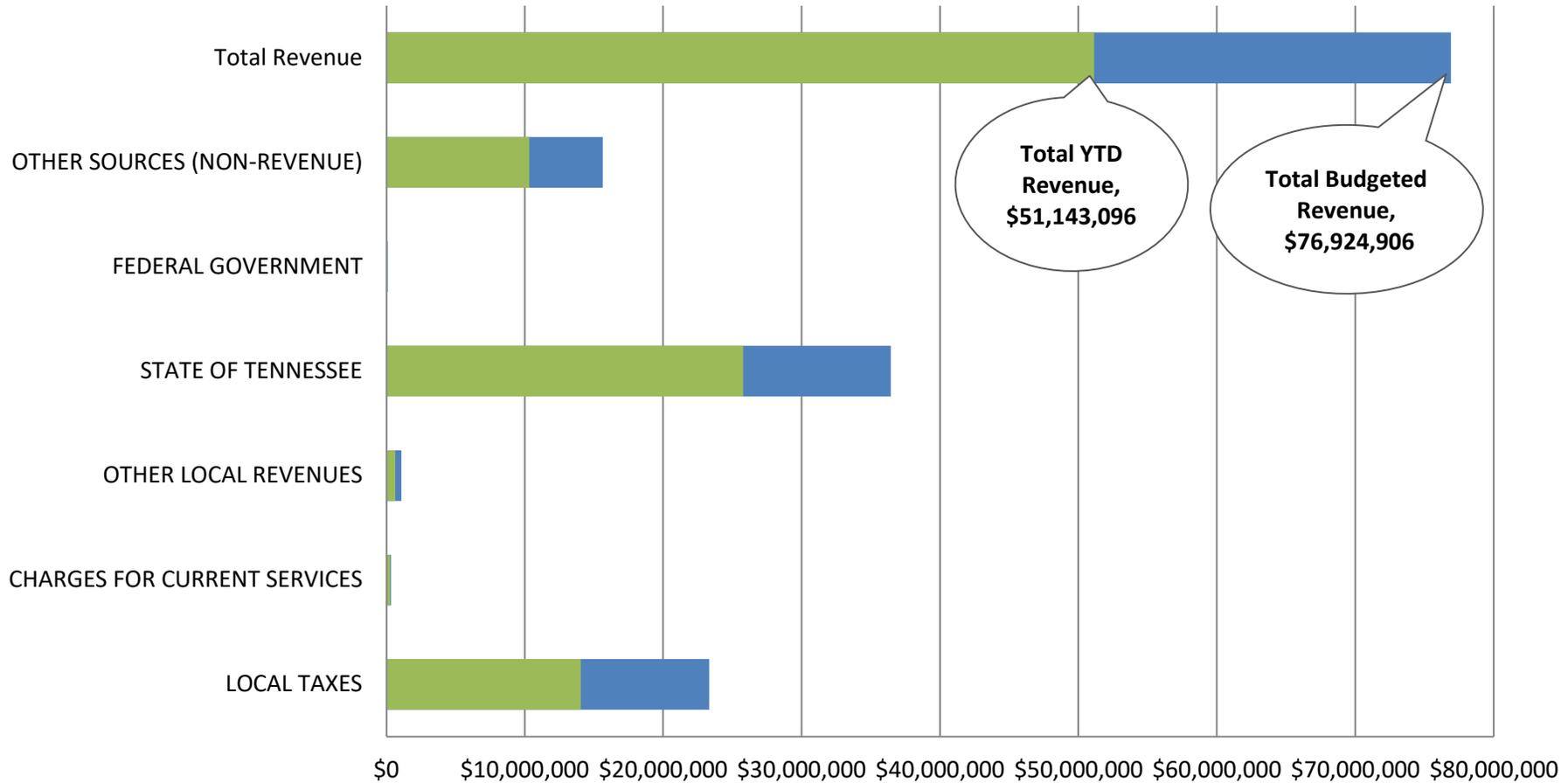
Acct	Acct	2025-26 FYTD Budget	February 2025-26 Monthly Activity	2025-26 Year-To-Date	2025-26 Percent of Budget	2025-26 Variance from Bud	Encumbered Amount	Unencumbered Budget Remaining
40110	Current Property Tax	13,830,000.00	1,114,543.50	7,582,998.75	54.83%	6,247,001.25		6,247,001.25
40210	Local Option Sales Tax	9,500,000.00	916,572.12	6,469,204.30	68.10%	3,030,795.70		3,030,795.70
40275	Mixed Drink Tax	500.00	15.77	500.59	100.12%	-0.59		-0.59
43511	Tuition - Regular Day Students	330,000.00	20,602.20	281,100.95	85.18%	48,899.05		48,899.05
43533	Transportation Fees	3,500.00	225.00	1,325.00	37.86%	2,175.00		2,175.00
44110	Interest Earned	800,000.00	58,166.59	479,851.78	59.98%	320,148.22		320,148.22
44120	Lease/Rentals	15,000.00	15.00	20,296.00	135.31%	-5,296.00		-5,296.00
44170	Miscellaneous Refunds	7,500.00	5,794.29	5,844.29	77.92%	1,655.71		1,655.71
44530	Sale of Equipment	15,000.00		79,451.00	529.67%	-64,451.00		-64,451.00
44570	Contributions & Gifts	200,000.00		47,911.18	23.96%	152,088.82		152,088.82
44990	Other Local Revenues	40,000.00		2,969.21	7.42%	37,030.79		37,030.79
46510	TN Investment in Student Achv	34,295,000.00	3,398,392.16	24,375,724.65	71.08%	9,919,275.35		9,919,275.35
46513	TISA On-Behalf Payments	85,000.00				85,000.00		85,000.00
46515	Early Childhood Education	648,925.10	48,669.34	277,163.61	42.71%	371,761.49		371,761.49
46590	Other State Education Funds	922,640.00		939,346.40	101.81%	-16,706.40		-16,706.40
46596	Paid Parental Leave	100,000.00	16,401.08	79,014.52	79.01%	20,985.48		20,985.48
46610	Career Ladder Program	76,000.00		36,906.97	48.56%	39,093.03		39,093.03
46790	Other Vocational	52,254.56	952.49	26,743.90	51.18%	25,510.66		25,510.66
46980	Other State Grants	274,623.34	7,516.90	20,488.82	7.46%	254,134.52		254,134.52
46990	Other State Revenues		25,718.41	25,718.41		-25,718.41		-25,718.41
47630	Public Law 874 - Maint/Operat.	25,000.00		20,222.00	80.89%	4,778.00		4,778.00
47640	ROTC Reimbursement	82,000.00	20,502.52	41,005.04	50.01%	40,994.96		40,994.96
49700	Insurance Recovery	3,000.00				3,000.00		3,000.00
49800	Transfers In	125,000.00				125,000.00		125,000.00
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	76,924,906.00	6,925,250.95	51,143,096.01	66.48%	25,781,809.99		25,781,809.99
		=====	=====	=====	=====	=====		=====
71100	Regular Instruction Prgm	37,966,519.16	2,805,254.58	24,190,576.66	63.72%	13,775,942.50	12,991,591.26	784,351.24
71150	Alternative Instruction Prgm	966,570.00	83,193.51	566,240.68	58.58%	400,329.32	378,691.38	21,637.94
71200	Special Education Prgm	6,705,889.41	560,996.88	3,953,701.40	58.96%	2,752,188.01	2,602,931.57	149,256.44
71300	Career/Technical Education Prg	2,598,405.92	212,410.91	1,490,901.52	57.38%	1,107,504.40	953,025.48	154,478.92
71900	Contingency	355,891.05		-639.00	-0.18%	356,530.05		356,530.05
72120	Health Services	974,424.00	86,307.29	586,023.31	60.14%	388,400.69	351,954.47	36,446.22
72130	Other Student Support	2,246,888.88	162,661.88	1,438,916.95	64.04%	807,971.93	637,826.89	170,145.04
72210	Regular Inst. Support	4,636,929.02	400,648.05	2,777,324.31	59.90%	1,859,604.71	1,430,589.58	429,015.13
72220	Special Education Support	768,930.00	59,253.78	467,062.07	60.74%	301,867.93	296,516.97	5,350.96
72230	Career & Technical Prg Support	273,584.00	19,799.74	166,729.82	60.94%	106,854.18	84,815.52	22,038.66
72250	Technology Services	3,222,243.02	228,222.01	2,076,840.84	64.45%	1,145,402.18	821,131.17	324,271.01

Acct	Acct	2025-26 FYTD Budget	February 2025-26 Monthly Activity	2025-26 Year-To-Date	2025-26 Percent of Budget	2025-26 Variance from Bud	Encumbered Amount	Unencumbered Budget Remaining
72290	Communications	341,836.00	27,536.00	218,838.36	64.02%	122,997.64	83,400.77	39,596.87
72310	Board of Education	1,368,795.00	48,779.97	852,758.60	62.30%	516,036.40	825.20	515,211.20
72320	Director of Schools	441,207.00	34,516.39	283,804.13	64.32%	157,402.87	139,682.57	17,720.30
72410	Office of the Principal	5,007,399.00	405,089.46	3,237,454.55	64.65%	1,769,944.45	1,662,173.12	107,771.33
72510	Fiscal Services	1,176,038.00	92,409.94	740,091.37	62.93%	435,946.63	373,013.03	62,933.60
72520	Human Resources/ Personnel	589,252.00	41,420.81	378,609.14	64.25%	210,642.86	163,362.49	47,280.37
72610	Operation of Plant	5,397,118.88	435,118.16	3,362,287.11	62.30%	2,034,831.77	962,412.88	1,072,418.89
72620	Maintenance of Plant	2,447,135.97	153,866.77	1,435,291.78	58.65%	1,011,844.19	722,561.36	289,282.83
72710	Transportation	2,255,879.00	199,543.84	1,354,093.66	60.03%	901,785.34		901,785.34
73400	Early Childhood Education	457,330.69	39,439.10	263,400.41	57.60%	193,930.28	184,075.52	9,854.76
73401	Pre-K General Fund	1,264,336.00	111,740.77	824,633.41	65.22%	439,702.59	390,227.29	49,475.30
76100	Regular Capital Outlay	1,582,505.00	25,922.64	760,712.29	48.07%	821,792.71	375,923.45	445,869.26
82130	Education Principal on Debt	6,912.00		6,912.00	100.00%			
82230	Education Interest on Debt	88.00		88.00	100.00%			
99100	Transfers Out	136,698.00				136,698.00		136,698.00
-----	Expense	83,188,805.00	6,234,132.48	51,432,653.37	61.83%	31,756,151.63	25,606,731.97	6,149,419.66
-----	General Purpose School Fund	-6,263,899.00	691,118.47	-289,557.36	64.06%	-5,974,341.64	-25,606,731.97	19,632,390.33
Grand Revenue Totals		76,924,906.00	6,925,250.95	51,143,096.01	66.48%	25,781,809.99		25,781,809.99
Grand Expense Totals		83,188,805.00	6,234,132.48	51,432,653.37	61.83%	31,756,151.63	25,606,731.97	6,149,419.66
Grand Totals		6,263,899.00	691,118.47	289,557.36	4.62%	5,974,341.64	25,606,731.97	19,632,390.33
		Loss	Profit	Loss		Loss	Loss	Profit

Number of Accounts: 1369

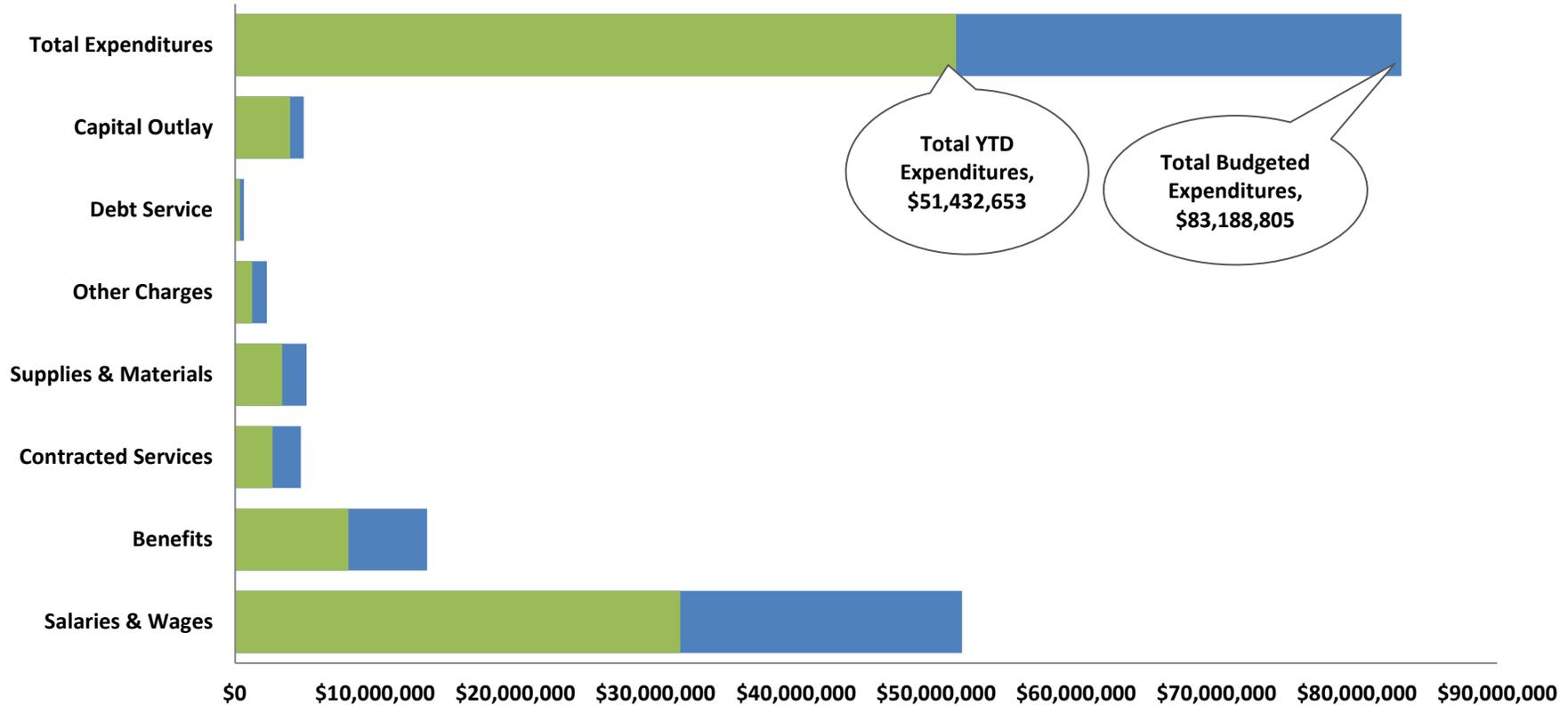
\*\*\*\*\* End of report \*\*\*\*\*

## General Fund Revenue Budget to Actual Summary - February, 2026



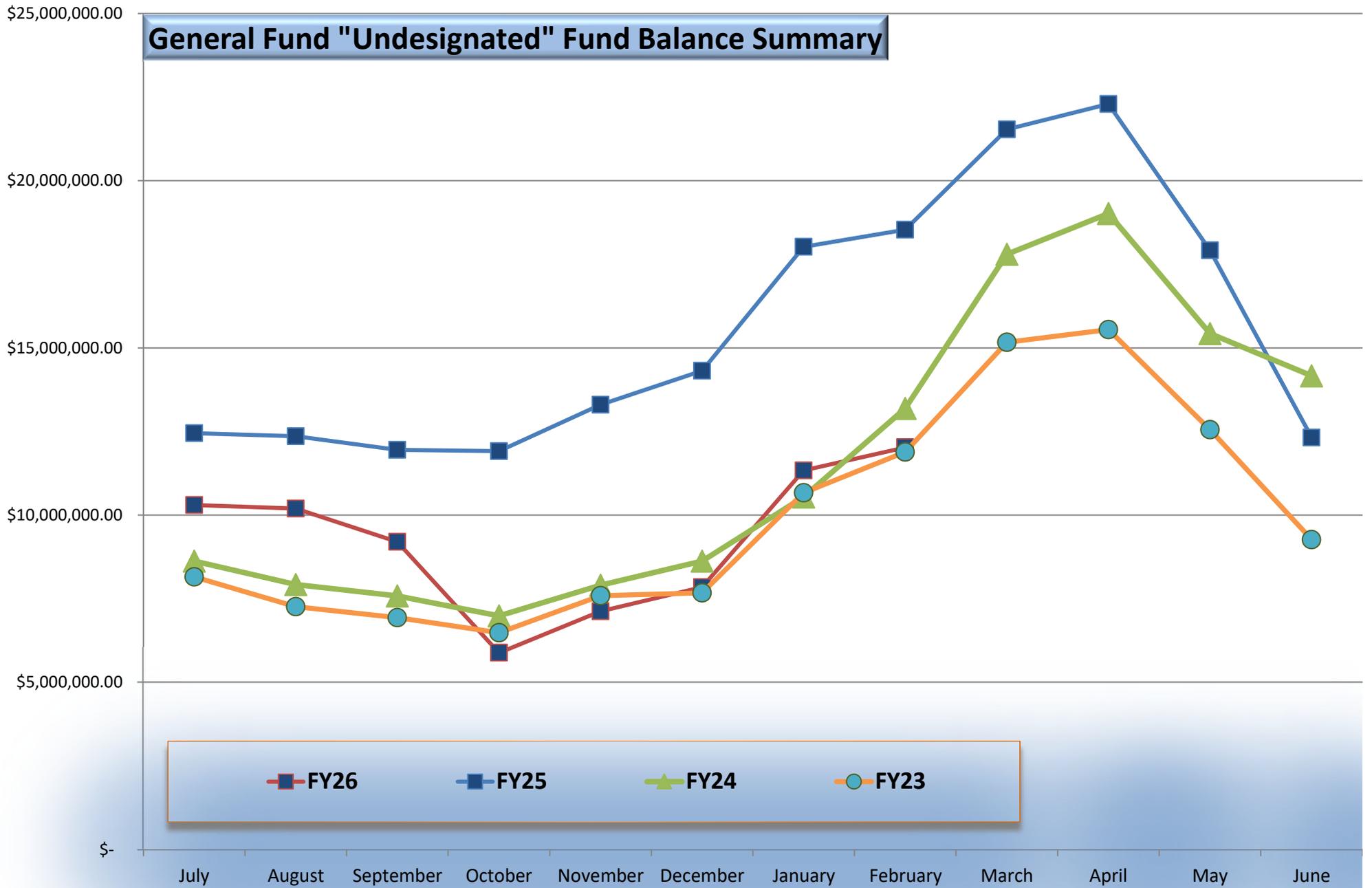
	LOCAL TAXES	CHARGES FOR CURRENT SERVICES	OTHER LOCAL REVENUES	STATE OF TENNESSEE	FEDERAL GOVERNMENT	OTHER SOURCES (NON-REVENUE)	Total Revenue
<b>Percent of Budget</b>	60.23%	84.69%	59.06%	70.72%	57.22%	66.12%	66.48%
<b>Year-To-Date</b>	14,052,703.64	282,425.95	636,323.46	25,781,107.28	61,227.04	10,329,308.64	\$51,143,096
<b>FYTD Budget</b>	23,330,500.00	333,500.00	1,077,500.00	36,454,443.00	107,000.00	15,621,963.00	\$76,924,906

## General Fund Expenditure Budget to Actual Summary by Object February, 2026



	Salaries & Wages	Benefits	Contracted Services	Supplies & Materials	Other Charges	Debt Service	Capital Outlay	Total Expenditures
<b>■ FYTD %</b>	61.25%	59.06%	56.77%	66.27%	54.35%	55.42%	80.15%	61.83%
<b>■ FYTD Activity</b>	31,751,449.26	8,093,371.81	2,675,190.09	3,380,374.19	1,236,974.12	357,000.00	3,938,293.90	\$51,432,653
<b>■ FYTD Revised Bdgt</b>	51,837,780.23	13,704,011.87	4,712,519.76	5,107,481.23	2,275,982.11	644,205.00	4,906,824.80	\$83,188,805

# General Fund "Undesignated" Fund Balance Summary





Acct	Acct	2025-26 FYTD Budget	February 2025-26 Monthly Activity	2025-26 Year-To-Date	2025-26 Percent of Budget	2025-26 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
143	Central Cafeteria							
R	Revenue							
43521	Lunch Payments - Children	272,580.00				272,580.00		272,580.00
43522	Lunch Payments - Adults	3,500.00	180.00	2,956.50	84.47%	543.50		543.50
43523	Income From Breakfast	43,000.00		8.25	0.02%	42,991.75		42,991.75
43525	A la Carte Sales	140,000.00	10,585.15	60,715.12	43.37%	79,284.88		79,284.88
43990	Other Charges for Food Service	200,000.00	28,585.29	106,816.12	53.41%	93,183.88		93,183.88
44110	Interest Earned	35,000.00	1,403.32	15,691.19	44.83%	19,308.81		19,308.81
46520	School Food Service	20,000.00				20,000.00		20,000.00
47111	USDA School Lunch Program	1,300,072.00	209,831.53	624,108.35	48.01%	675,963.65		675,963.65
47112	USDA Commodities	175,000.00				175,000.00		175,000.00
47113	Breakfast	360,108.00	65,871.58	198,006.02	54.99%	162,101.98		162,101.98
47114	USDA - Other	350,000.00	29,747.70	173,306.87	49.52%	176,693.13		176,693.13
-----	Revenue	2,899,260.00	346,204.57	1,181,608.42	40.76%	1,717,651.58		1,717,651.58
E	Expense							
73100	Food Service	3,649,340.00	10,661.58	1,390,884.01	38.11%	2,258,455.99	218,813.99	2,039,642.00
-----	Expense	3,649,340.00	10,661.58	1,390,884.01	38.11%	2,258,455.99	218,813.99	2,039,642.00
-----	Central Cafeteria	-750,080.00	335,542.99	-209,275.59	39.28%	-540,804.41	-218,813.99	-321,990.42
=====								
145	Other Education Funds							
R	Revenue							
44990	Other Local Revenues	35,000.00	500.00	27,089.00	77.40%	7,911.00		7,911.00
49800	Transfers In	136,698.00				136,698.00		136,698.00
-----	Revenue	171,698.00	500.00	27,089.00	15.78%	144,609.00		144,609.00

Acct	Acct	2025-26 FYTD Budget	February 2025-26 Monthly Activity	2025-26 Year-To-Date	2025-26 Percent of Budget	2025-26 Variance from Bud	Encumbered Amount	Unencumbered Balance Remaining
145	Other Education Funds							
E	Expense							
72130	Other Student Support			115.29		-115.29		-115.29
73300	Community Services	171,698.00	13,280.08	100,218.27	58.37%	71,479.73	50,350.18	21,129.55
-----	Expense	171,698.00	13,280.08	100,333.56	58.44%	71,364.44	50,350.18	21,014.26
-----	Other Education Funds		-12,780.08	-73,244.56	37.11%	73,244.56	-50,350.18	123,594.74
=====								
146	Extended School Program							
R	Revenue							
43581	Community Services Fees Child	500,000.00	52,407.00	398,033.00	79.61%	101,967.00		101,967.00
-----	Revenue	500,000.00	52,407.00	398,033.00	79.61%	101,967.00		101,967.00
E	Expense							
73300	Community Services	555,177.00	51,642.28	350,768.03	63.18%	204,408.97	127,897.70	76,511.27
99100	Transfers Out	15,000.00				15,000.00		15,000.00
-----	Expense	570,177.00	51,642.28	350,768.03	61.52%	219,408.97	127,897.70	91,511.27
-----	Extended School Program	-70,177.00	764.72	47,264.97	69.97%	-117,441.97	-127,897.70	10,455.73
=====								
Grand Revenue Totals		8,212,958.00	725,878.54	3,674,984.18	44.75%	4,537,973.82		4,537,973.82
Grand Expense Totals		9,033,215.00	387,278.11	4,253,932.33	47.09%	4,779,282.67	1,673,197.88	3,106,084.79
Grand Totals		820,257.00	338,600.43	578,948.15	70.58%	241,308.85	1,673,197.88	1,431,889.03
		Loss	Profit	Loss		Loss	Loss	Profit

Number of Accounts: 352

## Combined Fund Balance and YTD Operating Statement Summary

**February, 2026**

Description	General Fund 141	Federal Fund 142	Food Service Fund 143	Special Fund 145	ECC Fund 146
<b>Beginning Fund Balance July 1, 2025</b>	21,596,951.44	0.00	1,696,042.07	36,519.24	364,535.50
Plus YTD Revenue per books 2/28/26	51,143,096.01	2,068,253.76	1,181,608.42	27,089.00	398,033.00
Less YTD Expenditures per books 2/28/26	(51,432,653.37)	(2,411,946.73)	(1,390,884.01)	(100,333.56)	(350,768.03)
<b>Revenues Over (Under) Expenditures as of 2/28/26</b>	<b>(289,557.36)</b>	<b>(343,692.97)</b>	<b>(209,275.59)</b>	<b>(73,244.56)</b>	<b>47,264.97</b>
<b>Ending Fund Balance per books as of 2/28/26</b>	<b>21,307,394.08</b>	<b>(343,692.97)</b>	<b>1,486,766.48</b>	<b>(36,725.32)</b>	<b>411,800.47</b>

### Fund Balance Restricted/Committed/Assigned Status

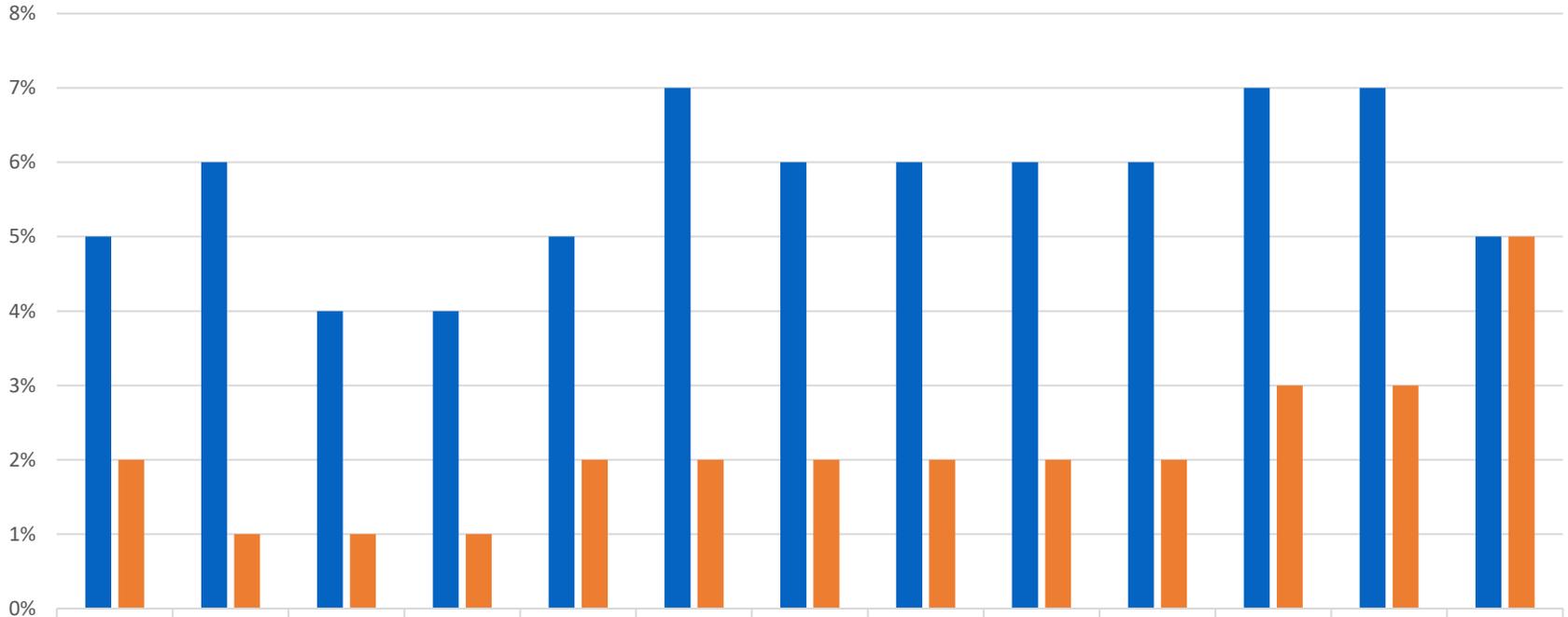
Encumbrances and Deferred Revenue	\$ -		\$ 33,265.23		
Inventory					
Restricted for Career Ladder Program	2,177.59				
Restricted for Operation of Non-Instructional Services (CCI)	3,509.75		703,421.25		411,800.47
Committed for Other Purposes (Vehicles- ERR Fund)	0.00				
Committed for Other Purposes (Device Replacement)	3,000,000.00				
Assigned for Instruction- Coordinated School Health	2,152.65				
Assigned for other local grants					
Assigned for Instruction - Education Foundation Grant	2,160.34				
Assigned for Instruction (APSI-ORHS)	5,712.22				
Assigned for Support Services FRC Local Funds (56)				-36,725.32	
Nonspendable-Prepaid Expenditures					
<b>Assigned to Balance FY26 Budget</b>	<b>6,263,899.00</b>	<b>0.00</b>	<b>750,080.00</b>		
<b>Unassigned Fund Balance 2/28/26</b>	<b>\$ 12,027,782.53</b>	<b>-343,692.97</b>	<b>0.00</b>	<b>0.00</b>	
<b>Total Fund Balance 2/28/26</b>	<b>21,307,394.08</b>	<b>\$ (343,692.97)</b>	<b>\$ 1,486,766.48</b>	<b>(\$36,725.32)</b>	<b>\$ 411,800.47</b>

# 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: 1/22/2026 - 2/24/2026

Percentage of Absences by Grade Level

■ Excused ■ Unexcused

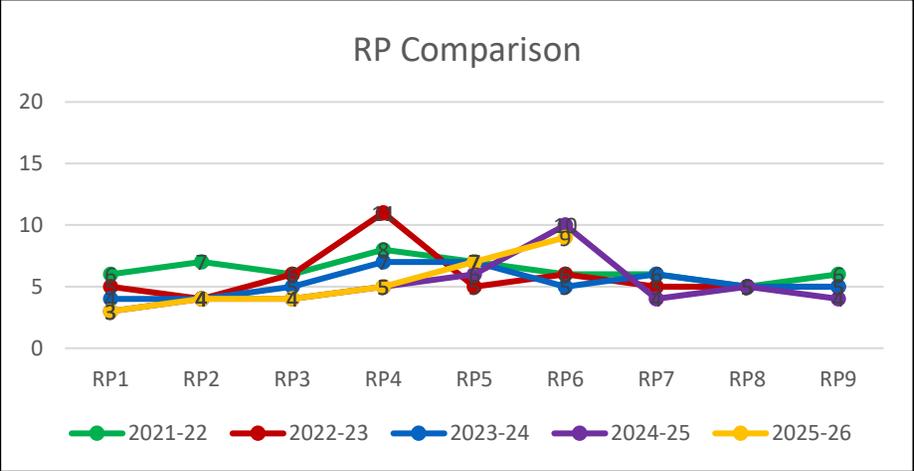
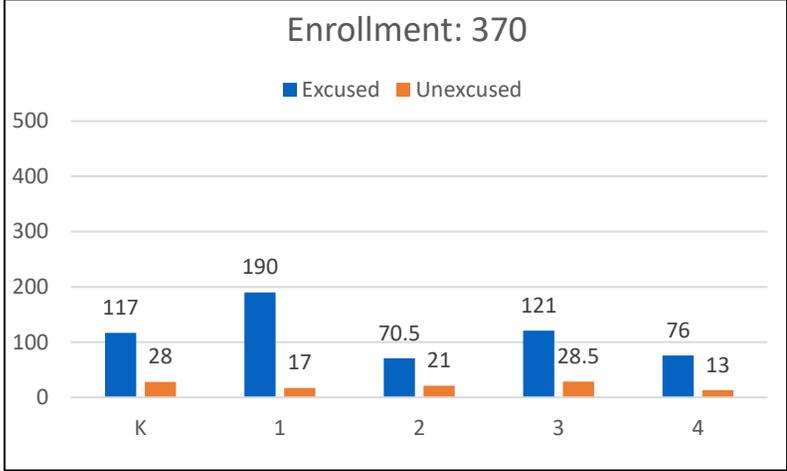


■ Excused	5%	6%	4%	4%	5%	7%	6%	6%	6%	6%	7%	7%	5%
■ Unexcused	2%	1%	1%	1%	2%	2%	2%	2%	2%	2%	3%	3%	5%

\* Percentages have been rounded to the nearest whole number.

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%	RP7: 3.8%	RP8: 5%	RP9: 3.8%
2025-26	RP1: 3%	RP2: 4.4%	RP3: 3.5%	RP4: 4.5%	RP5: 6.8%	RP6: 9.2%			

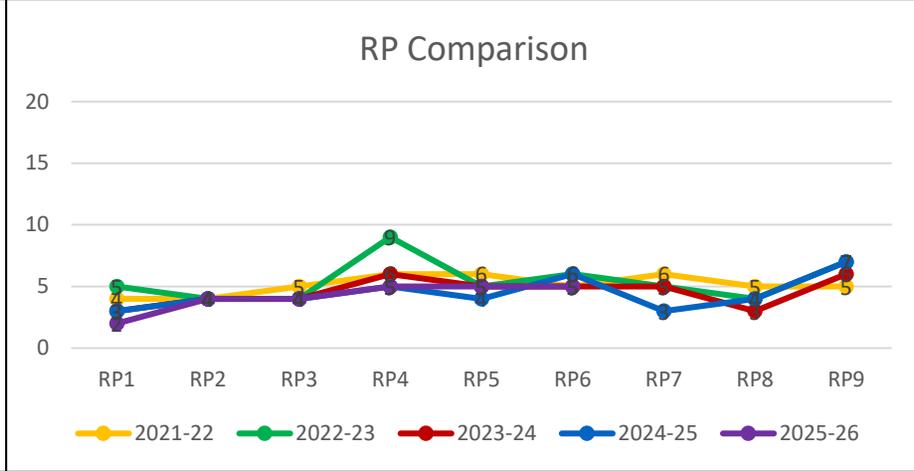
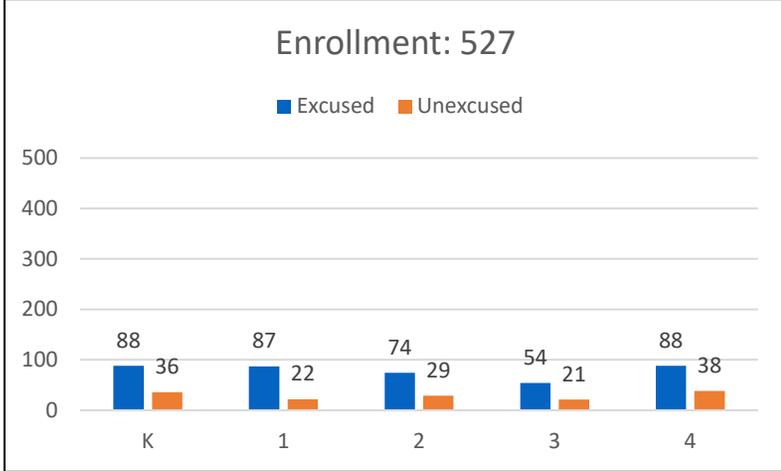
# Glenwood



Goal
5.5

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%	RP7: 3.2%	RP8: 3.6%	RP9: 6.8%
2025-26	RP1: 2.3%	RP2: 3.9%	RP3: 4.1%	RP4: 4.7%	RP5: 4.6%	RP6: 5%			

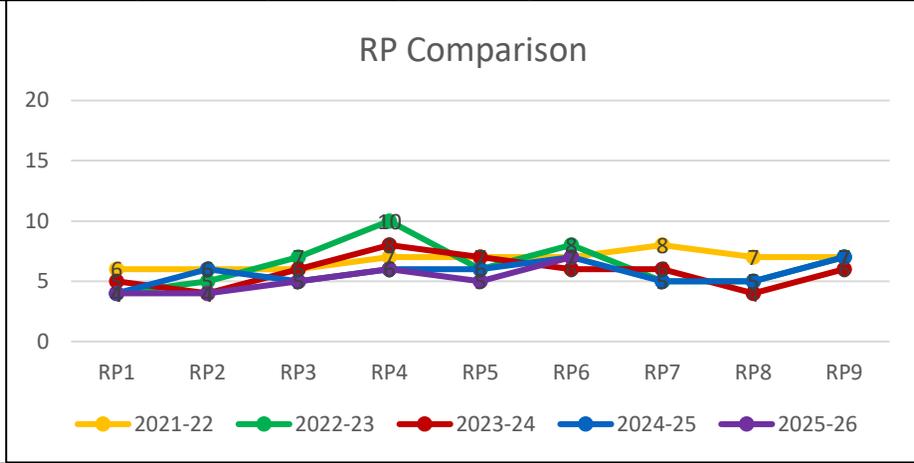
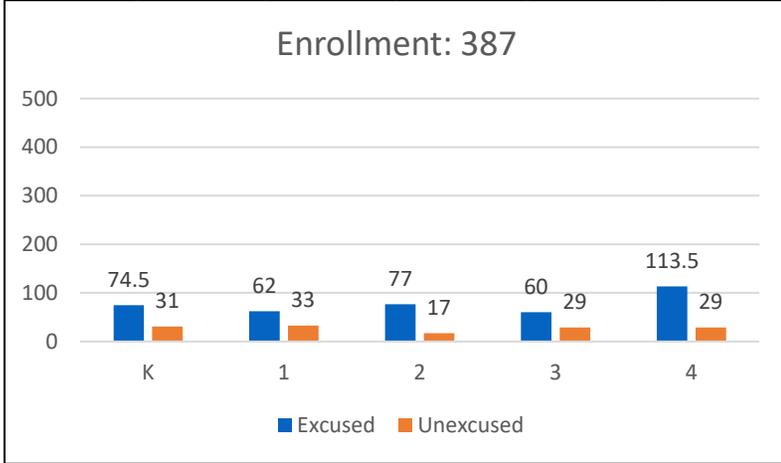
# Linden



Goal
5

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%	RP7: 5%	RP8: 4.9%	RP9: 7.4%
2025-26	RP1: 3.8%	RP2: 4.3%	RP3: 5.1%	RP4: 5.8%	RP5: 5%	RP6: 6.7%			

# Willow Brook

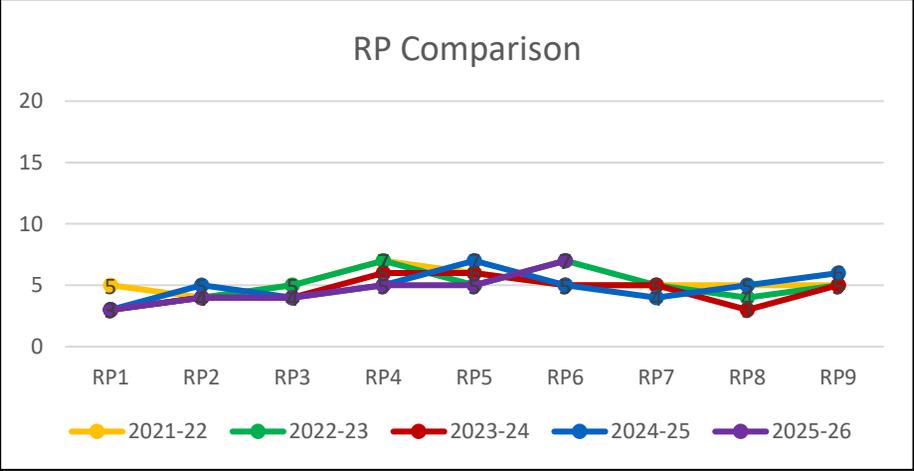
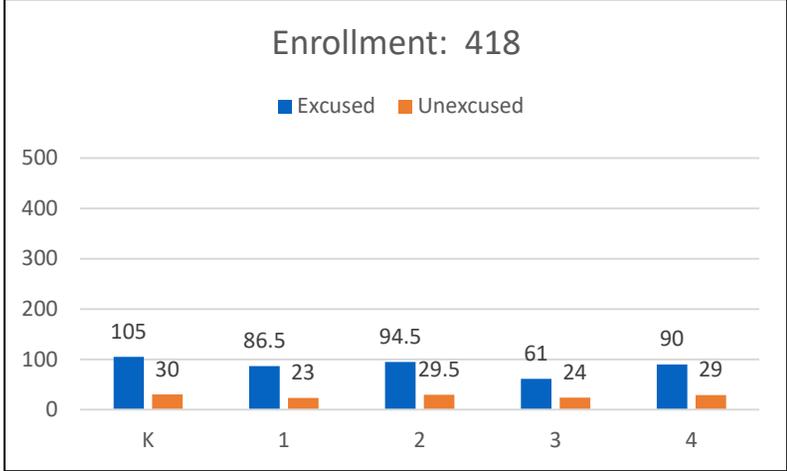


Goal

6
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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%	RP7: 3.7%	RP8: 3.9%	RP9: 5.5%
2025-26	RP1: 3.4%	RP2: 3.7%	RP3: 4.3%	RP4: 5.1%	RP5: 4.5%	RP6: 6.8%			

# Woodland

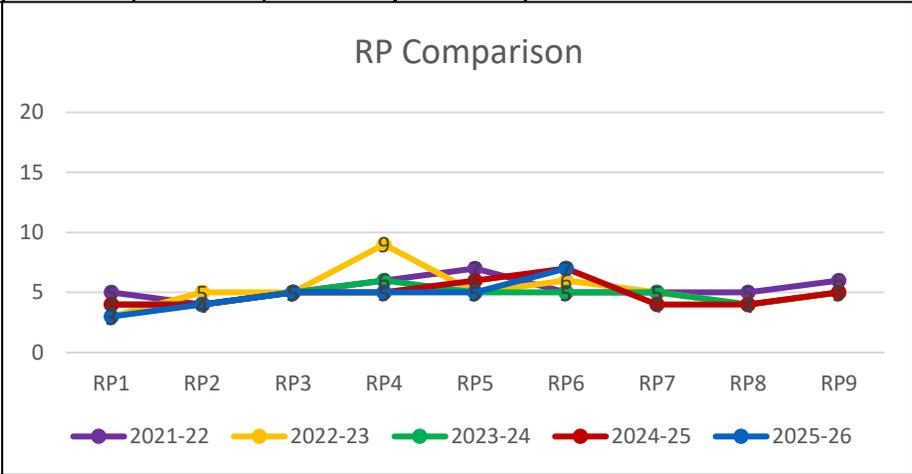
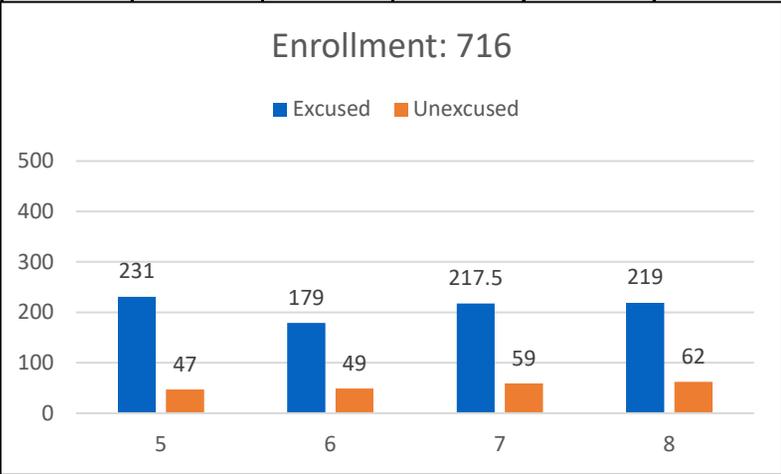


**Goal**

4
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# Jefferson

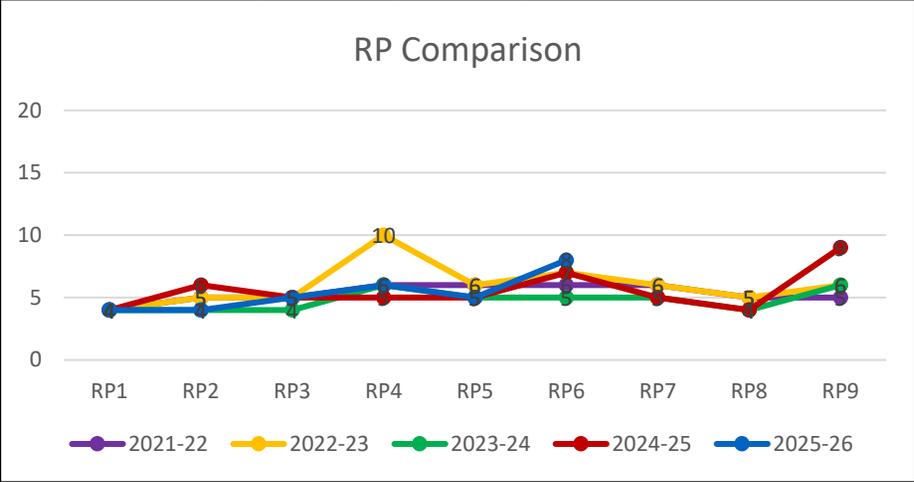
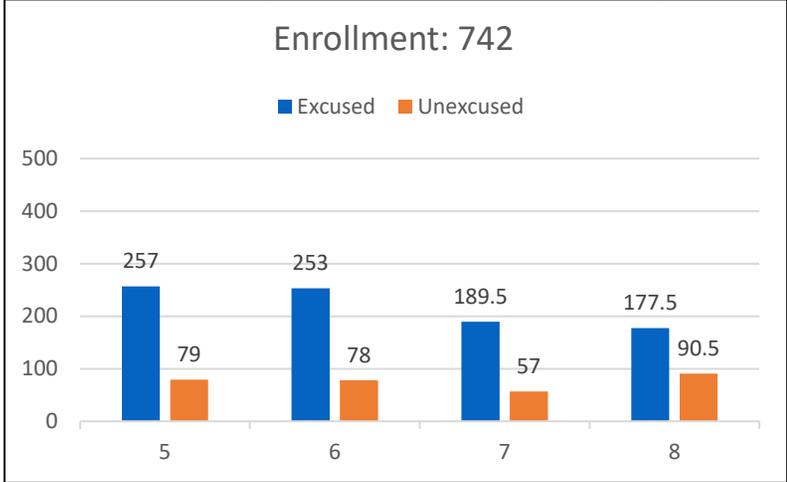
2021-22	RP1: 5.1%	RP2: 4.2%	RP3: 4.9%	RP4: 5.9%	RP5: 6.8%	RP6: 5.4%	RP7: 5.3%	RP8: 4.9%	RP9: 6.1%
2022-23	RP1: 3.1%	RP2: 4.6%	RP3: 5%	RP4: 8.7%	RP5: 4.7%	RP6: 5.5%	RP7: 5.1%	RP8: 4.3%	RP9: 5.3%
2023-24	RP1: 3.8%	RP2: 4.4%	RP3: 4.5%	RP4: 5.6%	RP5: 5.3%	RP6: 5.3%	RP7: 5.1%	RP8: 4%	RP9: 5.3%
2024-25	RP1: 3.6%	RP2: 4.2%	RP3: 4.8%	RP4: 5%	RP5: 5.5%	RP6: 6.8%	RP7: 4.1%	RP8: 3.6%	RP9: 5%
2025-26	RP1: 3.4%	RP2: 3.5%	RP3: 4.5%	RP4: 4.6%	RP5: 4.7%	RP6: 7.4%			



Goal
4.5

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%	RP7: 4.9%	RP8: 3.8%	RP9: 9.1%
2025-26	RP1: 3.9%	RP2: 3.8%	RP3: 4.8%	RP4: 5.5%	RP5: 5.4%	RP6: 7.9%			

# Robertsville

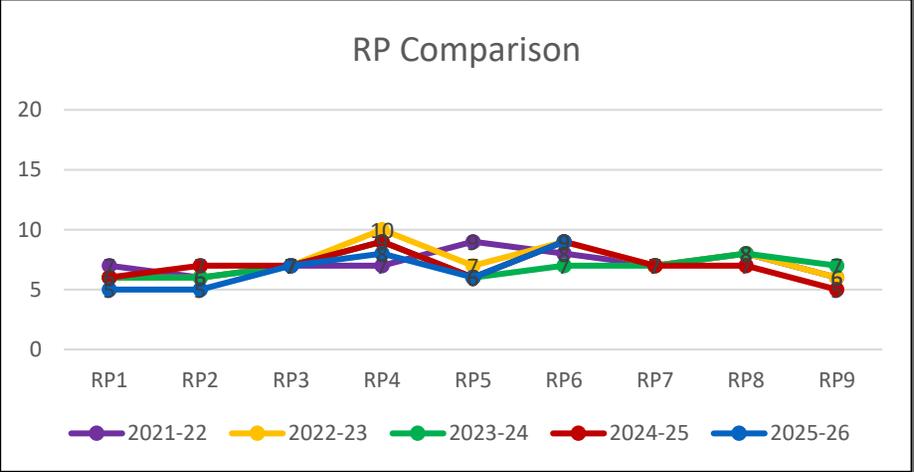
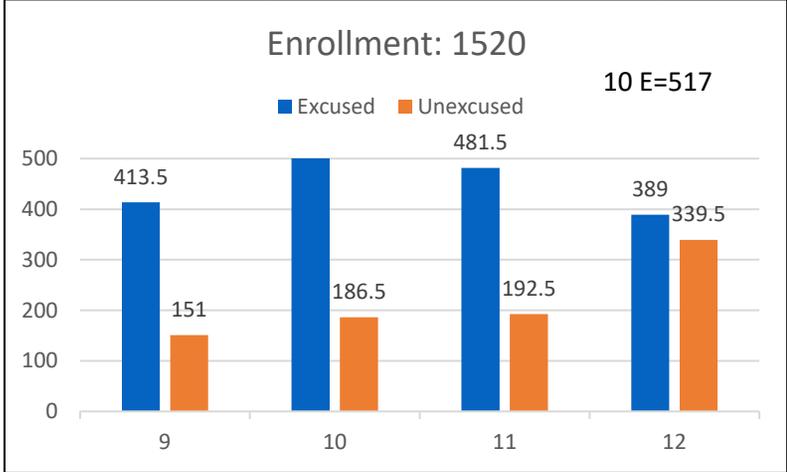


**Goal**

5
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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%	RP7: 7.2%	RP8: 7.2%	RP9: 5%
2025-26	RP1: 5%	RP2: 5.2%	RP3: 7.1%	RP4: 7.5%	RP5: 6.2%	RP6: 8.8%			

# ORHS



Goal
6



**Oak Ridge Schools**

**6th Attendance Period**

**March 6, 2026**

These numbers reflect the **2025-2026** Skyward Student Management System (Entity) active student enrollment count as of **March 6, 2026**.

The total includes **40** private school and home-schooled students receiving Special Ed services.



# Oak Ridge Schools

## Enrollment Entity Counts 6th RP 2025-26

March 6, 2026

School	P3	P4	K	1	2	3	4	5	6	7	8	9	10	11	12	Total PK-12 2025-26	Previous 5th RP 2025-26	Diff	Total PK-12 2024-25
Preschool	65	128														193	192	1	243
Glenwood			71	85	62	74	78									370	371	-1	370
Linden			95	98	111	106	117									527	526	1	521
Willow Brook			75	66	89	81	76									387	389	-2	424
Woodland			76	72	78	84	108									418	420	-2	425
JMS								176	186	180	174					716	718	-2	714
RMS								187	192	181	182					742	743	-1	763
ORHS												375	413	390	342	1520	1528	-8	1609
Service School	37	2	2	1	3		2	2		1	2	1				53	52	1	0
<b>Enrollment 2025-26</b>	<b>102</b>	<b>130</b>	<b>319</b>	<b>322</b>	<b>343</b>	<b>345</b>	<b>381</b>	<b>365</b>	<b>378</b>	<b>362</b>	<b>358</b>	<b>376</b>	<b>413</b>	<b>390</b>	<b>342</b>	<b>4926</b>	<b>4939</b>	<b>-13</b>	<b>5069</b>
Prev. 5th RP 2025-26	102	129	317	323	345	344	384	366	380	362	358	377	414	394	344	4939			
Difference	0	1	2	-1	-2	1	-3	-1	-2	0	0	-1	-1	-4	-2	-13			

This report compares the 2025-26 6th RP enrollment with the 2025-26 5th RP.