



Sumter County Schools
Proposal for Student Tutorials
Grades 2-8 ELA & Math (ACAP Prep)
Grade 11 ACT Tutorials
January 11, 2023

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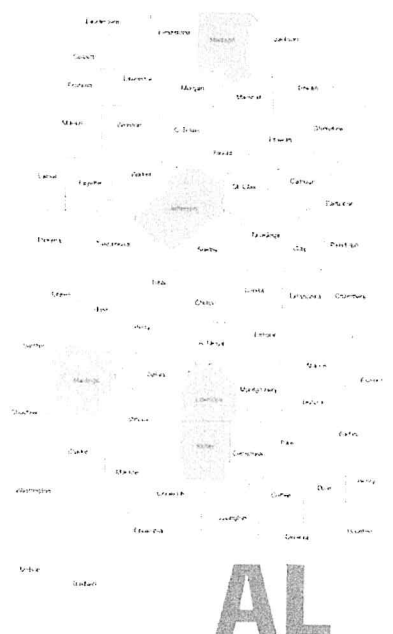
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OVERVIEW

For over a decade, Bailey's team of premiere instructional coaches, leadership coaches, and project managers serve schools and districts and ensure that the services provided are researched-based and effective. They customize areas of focus to support school and district goals. *All services can be offered in-person or virtually.* Bailey's coaches customize support through group trainings and individualized, job-embedded coaching and modeling.



2021-2022 State District Partners



SCOPE OF SERVICES

Coaches work with teachers to build capacity and produce positive results with a focus on the Professional Growth Standards for Teachers and the goal performance areas below.

- Curriculum Mapping and Alignment for College and Career-Ready Standards
- Social Emotional Learning and Behavior Management
- Data Driven Decision Making to Customize Instruction
- Customizing and Differentiating Instruction Scaffolded to the Rigor of the Standards
- New Induction Teacher Supports
- Lesson Planning, Preparing and Instructional Delivery
- Career and Technical Education
- Student Engagement and Motivation
- Content Engagement Practices
- Special Education and EL Learners Guidance and Coaching
- Formative and Summative Assessment
- Higher Order Questioning and Problem Solving
- 21st Century Technology Integration in the Classroom
- Extended Learning Time and Customized Learning for the Lowest 25% of Students

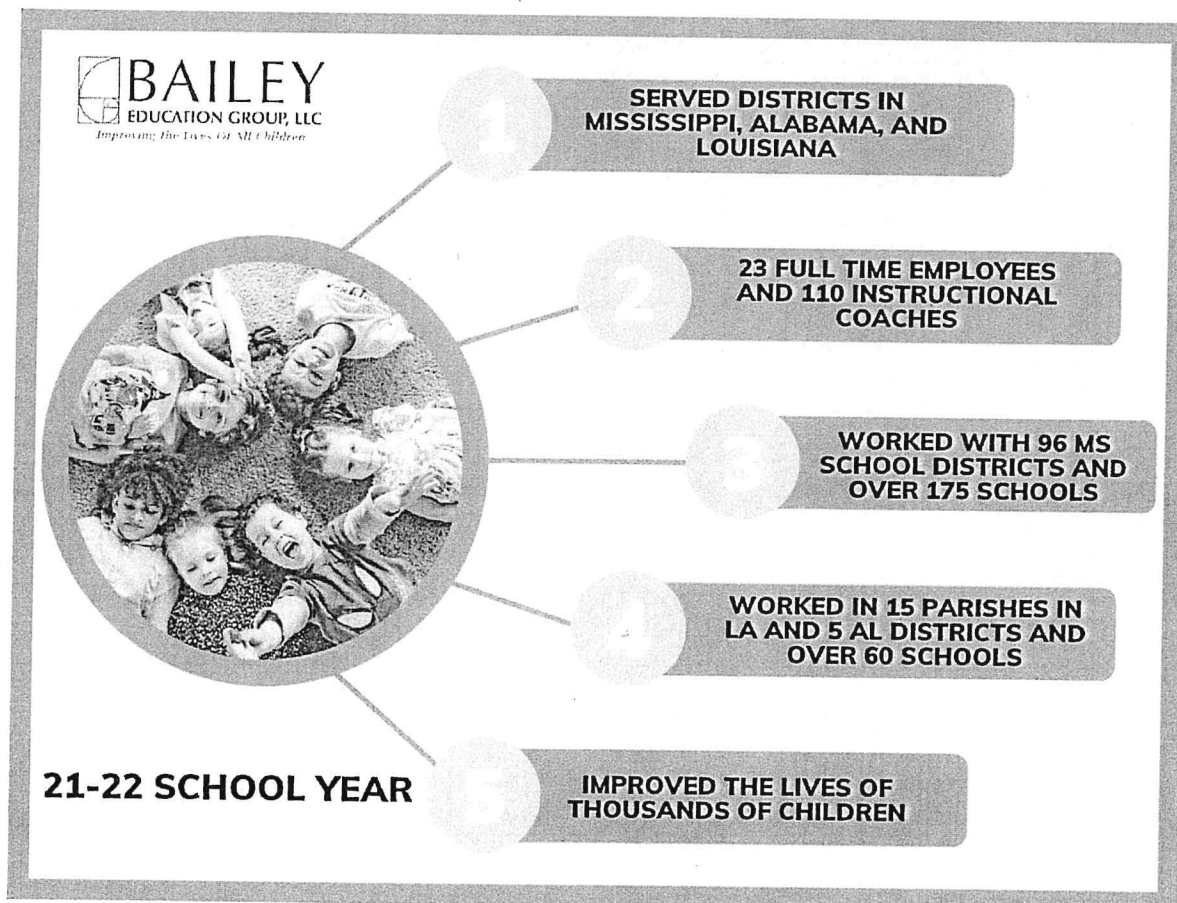
Service Delivery, Debarment, and Contractual Agreement: Bailey's coaches will support special and general education teachers by serving/working as a resource provider, assessment and data coach, and curriculum and instructional specialist. Service delivery includes onsite (job-embedded) and virtual training, coaching, modeling, co-teaching, consultation, and technical assistance. Additionally, staffing of the project can be adjusted at any time by request of the school, district or by Bailey if goals are not being met. Our client retention rate is very high with no debarment over the past decade serving schools across the state of Mississippi. This agreement between the school district and Bailey will become effective when signed by both parties and will terminate on the earlier of the date contractor completes the services required by this contractual agreement, or the date a party terminates the contract. With reasonable cause, either client or contractor may terminate this agreement, effective immediately upon giving written notice, due to reasonable cause that violates any of the material of this agreement with the quality of work outlined.

PROGRAM MANAGEMENT AND COMMUNICATION

All Bailey work is managed and evaluated by a Bailey Project Manager, with extensive support from the Bailey Leadership Team. Student and teacher performance data will be analyzed and evaluated to identify strengths as well as areas of concern. The Bailey team will work tirelessly to ensure that all services are provided with evidence-based fidelity. Services, including professional development, in-classroom coaching and modeling, co-teaching, student tutorials, data coaching and technical assistance are all provided with a focus on achieving district and school level transformation goals. Coaches will debrief with the principal or designees and submit a detailed work report for each day of services. Qualitative and quantitative program evaluation will be continuous throughout the project. Qualitative data will be gathered and shared weekly through e-mailed summary reports sent to appropriate leadership. Quantitative data will be gathered and organized from universal screening, progress monitoring, and benchmark assessments as they are available. The project manager will regularly review student and teacher data to evaluate effectiveness and meet regularly with leadership to discuss overall strengths, concerns, recommendations, and next steps.

RESULTS

Bailey Education Group has a proven track record in professional development programs for school districts and individual school sites that is quantifiable. The table below details the work accomplished by Bailey Education Group during the 21-22 school year in school districts across the states of Mississippi, Alabama, and Louisiana.



District Partner Results 21-22

District	20-21 Score		21-22 Score	
Aberdeen School District	F	479	C	542
Biloxi Public School District	A	720	A	724
Brookhaven School District	C	556	C	590
Calhoun County School District	C	585	B	654
Canton Public School District	D	533	B	631
Chickasaw County School District	D	518	A	684
Choctaw County School District	B	650	A	699
Cleveland School District	C	559	C	554
Clinton Public School District	A	729	A	774
Columbia School District	B	639	B	667
Columbus Municipal School District	D	514	C	547
Copiah County School District	C	549	C	556
Covington County School District	C	581	C	567
Desoto County School District	A	675	A	722
George County School District	B	634	A	684
Grenada School District	B	660	A	669
Gulfport School District	A	673	A	687
Hattiesburg Public School District	D	534	A	672
Hinds County School District	C	585	B	624
Holmes Consolidated School District	F	439	C	555
Itawamba County School District	B	666	A	690
Jackson County School District	A	685	A	713
Jackson Public School District	D	504	C	569
Jones County School District	B	640	B	645
Kemper County School District	F	475	C	592
Kosciusko School District	B	612	B	623
Lamar County School District	A	709	A	696
Lauderdale County School District	B	634	A	693
Laurel School District	F	486	C	569
Leake County School District	C	565	C	547
Lee County School District	B	606	B	618
Leland School District	D	507	C	575
Long Beach School District	A	696	A	803
Madison County School District	A	726	A	752
Marshall County School District	C	566	C	586
McComb School District	D	521	C	580
Meridian Public School District	D	513	C	558
Natchez-Adams School District	D	527	B	614
New Albany Public School District	A	694	A	750
Newton Municipal School District	C	589	C	584
North Pike School District	B	610	B	628

District	20-21 Score		21-22 Score	
North Tippah School District	B	652	B	641
Ocean Springs School District	A	731	A	771
Pascagoula Gautier School District	B	632	A	684
Pass Christian Public School District	A	704	A	735
Pearl Public School District	A	686	A	691
Philadelphia Public School District	D	525	C	537
Pontotoc City School District	A	695	A	686
Pontotoc County School District	B	651	A	677
Quitman County School District	C	557	C	563
Quitman School District	C	544	C	588
Rankin County School District	A	707	A	733
Scott County School District	C	582	B	618
Senatobia Municipal School District	B	649	B	606
Simpson County School District	C	565	C	573
South Panola School District	B	649	B	642
South Pike School District	D	496	C	552
South Tippah School District	B	632	B	658
Starkville- Oktibbeha Consolidated School District	C	577	B	610
Stone County School District	A	696	A	708
Tunica County School District	C	592	B	624
Tupelo Public School District	B	654	A	701
Union County School District	A	718	A	766
Union Public School District	A	684	A	689
Walthall County School District	D	504	C	571
Water Valley School District	D	534	B	632
Wayne County School District	C	592	B	635
West Bolivar Consolidated School District	F	429	D	495
West Jasper Consolidated School District	C	593	B	637
West Point Consolidated School District	C	585	C	596
Winona-Montgomery Consolidated School District	D	515	C	563

QUALIFICATIONS

The mission of Bailey Education Group is to improve the lives of all children. This mission is accomplished through data driven analysis, training, coaching, modeling, and continual monitoring and adjusting to ensure success. Bailey recognizes and embraces the tenets of cultural proficiency, and our coaches are representative of the state's ethnic and cultural diversity. Because of their own professional and personal experiences, Bailey coaches are consistently successful working in diverse settings and advancing the core tenets of cultural proficiency.

Bailey Education Group, LLC, located at 201 Park Court, Ridgeland, MS 39157, was founded in October 2007 by Gary Bailey, AIA. Gary's business experience in school improvement is without peer in Mississippi, having founded and operated other successful education companies. Today with over 20 years' experience in the industry, he serves as president and owner.

Pat Ross serves as Chief Executive Officer and Interim Alabama State Director. Pat has served as a public educator in Mississippi for more than 20 years. His education experience includes teacher, coach, assistant principal, principal, Superintendent, Deputy State Superintendent, and Education Policy Advisor to Governor Phil Bryant. Pat currently oversees all operations for Bailey Education Group and is specifically focused on providing leadership development academies, retreats, and one-on-one coaching sessions with school leaders in Mississippi.

Hank Bounds, PhD, serves as Vice President of Strategy and Business Development. Hank brings a wealth of district, state, and national experience to Bailey Education Group having served as a principal, local superintendent, State Superintendent of Education, Commissioner of the Mississippi Institutions of Higher Education, and President of the University of Nebraska. In 2019 Dr. Bounds retired from Nebraska and returned to our area to continue to serve children.

Andy Parker, PhD, serves as Vice President of Operations and Support and Interim Louisiana State Director. Andy Parker is an energetic, motivational leader and speaker who has been teaching students and leading schools and districts for the past 30 years. His background in high school English and his passion for supporting those in leadership roles propelled him to write his book, *Building Brilliant Schools: What GREAT Leaders Do Differently*, which was published in 2021. The book quickly became an international bestseller. His companion workbook, *50 Tools to Build Brilliant Schools* is now available.

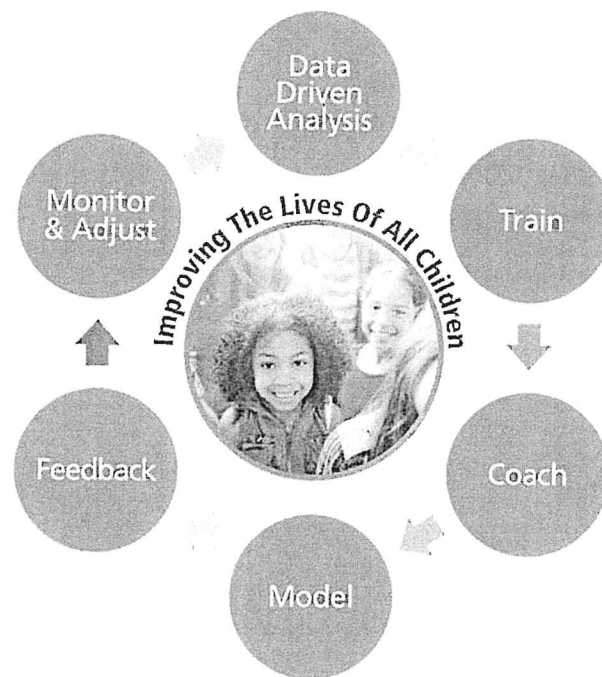
Tanisha Washington serves as Vice President of Educational Services and Interim Mississippi State Director. Tanisha is a former elementary and middle school English Language Arts teacher with over 20 years of experience in various areas of education. She has served in the capacity of Academic Curriculum Coach, Curriculum Coordinator, Interventionist, School Test Coordinator, LSC Chairperson, among other titles outside the scope of regular classroom educator.



PROFESSIONAL SERVICES AND SUPPORT

Bailey Education Group, LLC, is an educational support company whose mission is to partner with all schools to improve the lives of all children. We achieve our mission and produce positive results with our customized professional development and on-site consultation, and a service delivery engineered to build capacity and ensure evidence of change.

In preparing this proposal, our team has communicated with school leadership; reviewed the historical demographic and student data of each school; and determined what our current processes support, as well as those that will require new customization. It is through this analysis that we have established a solid understanding of the proposed scope of work.



Bailey's coaches will support district goals and expectations by serving/working as classroom supporters, resource providers, assessment and data coaches, and curriculum and instructional specialists.

OUR RESEARCH

Long recognized as Mississippi's Premier Education Service Provider, Bailey Education Group is pleased to provide evidenced based research for our professional development and coaching services by demonstrating a statistically significant effect on student outcomes, as well as a strong alignment to what works best in professional development.

Under ESSA, Mississippi schools have been given the flexibility to choose school improvement interventions that: 1) provide a compelling and sufficient evidence-base for their impact on student outcomes; 2) meet the needs of the school, based on a thoughtful and thorough needs assessment; and 3) define a method for follow-up to track and monitor successful implementation.

A statistically significant effect means that the change was not due to chance. Effect sizes expressed in standard deviations are used to measure the effect, with Cohen's d (1988) being the most widely used. When using Cohen's d for considering effects, $d = .2$ is small, $d = .5$ is medium, and $d = .8$ is considered large. Although ESSA has not set minimal standards for this measure, the What Works Clearinghouse (WWC) recognizes .25 and higher as statistically significant.

Bailey's work is validated by the work of Timperley, Wilson, Barrar, and Fung (2007) who found 72 studies that assessed the effects of professional development on student outcomes. Based on their meta-analysis of these studies, the overall effect on student outcomes was $d = .66$, validating that professional development has a medium to large effect on student outcomes and is significantly higher than the minimal standards of the WWC's ($d = .25$). Timperley and his colleagues used effect sizes to identify what works best in professional development as well. Bailey Education's model has a high correlation to the six themes identified in their work.

Theme 1: Learning opportunities occurred over an extended period. Bailey's service model is continuous and includes data driven analysis, training, coaching, modeling, and monitoring and adjustments. Bailey's service delivery is aligned to the seven key focus areas established by Learning Forward in their Professional Learning Standards: Learning Communities, Leadership, Resources, Data, Learning Designs, Implementation and Outcomes.

Theme 2: Involvement of experts was more related to success than in-school initiatives. Bailey's trainers and coaches are experts in their field of work and must have a record of improving student outcomes with professional learning. Baily trainers and coaches are supported by a Leadership Team and Project Managers who engage them in continuous learning to ensure they are updated and prepared to deliver what works best in professional development.

Theme 3: Teacher engagement during the learning process. Bailey's model is job embedded and engages teaching staff throughout the process; data driven analysis, training, coaching, modeling, and monitoring and adjustments.

Theme 4: Effects of student outcomes were a function of professional learning. Bailey trainers and coaches rely heavily on identified teacher needs and the impact of professional development on student outcomes. Available data sources are continually used to monitor the effectiveness of professional development based on student outcomes.

Theme 5: Professional learning communities and teachers communicating with teachers. Bailey's work is anchored to the seven key focus areas recognized in Learning Forward's Professional Learning Standards, one of which is Professional Learning Communities (PLC). Bailey's service model serves as a guide for the establishment and engagement in PLC's. Bailey's fee waived resources made available through Drop Box enhance and encourage teachers to communicate with other teachers using the customized resources and tool kits.

Theme 6: School leadership supports professional learning. Leadership is one of the seven key focus areas recognized by Learning Forward and as such is critical to professional learning through professional development. Bailey coaches work closely with school leadership to: 1) develop a plan customized to school and teacher needs; 2) engage school leadership in the learning process with teachers; and 3) follow-up to monitor and track the effectiveness of implementation and its impact on student outcomes.

COST

Bailey Education Group will provide services at a daily rate of \$1,500.00 per day per coach. This rate is all inclusive of costs. Materials and instructional deliverables provided to the district during the duration of the project will be provided via electronic copies to the district.

Total Number of Days for Project

220

Consultants will be assigned to each school grade band. Project manager and district point of contact will plan prior to beginning project to map out specific dates for student tutorials, plan with each school leader to ensure clear communication and effective planning of schedule.

- Livingston JHS (Grades 2-5) ELA Consultant--20 days
- Livingston JHS (Grades 2-5) Math Consultant- 20 days
- Livingston JHS (Grades 2-5) Science Consultant – 15 days
- Livingston JHS (Grades 6-8) ELA Consultant-- 15 days
- Livingston JHS (Grades 6-8) Math Consultant--15 days
- Livingston JHS (Grades 6-8) Science Consultant – 15 days
- York West End JHS (Grades 2-5) ELA Consultant—8 days
- York West End JHS (Grades 2-5) Math Consultant—8 days
- York West End JHS (Grades 2-5) Science Consultant – 8 days
- York West End JHS (Grades 6-8) ELA Consultant—7 days
- York West End JHS (Grades 6-8) Math Consultant—7 days
- York West End JHS (Grades 6-8) Science Consultant – 7 days
- Sumter Central High School (9th--11th Grade ACT Tutorials) ELA Consultant—10 days
- Sumter Central High School (9th--11th Grade ACT Tutorials) Math Consultant—10 days
- Sumter Central High School (9th--11th Grade ACT Tutorials) Science Consultant – 10 days
- Kinterbish Junior High School (Grades 2-8) Math Consultant 15 days
- Kinterbish Junior High School (Grades 2-8) ELA Consultant 15 days
- Kinterbish Junior High School (Grades 2-8) Science Consultant 15 days

Total Cost of Project

\$ 330,000

Includes all Expenses and Travel Costs

Proposal Submitted By:



Gary Bailey

Bailey Education Group, LLC

January 11, 2023

Date

Proposal Accepted By:



Anthony L. Gardner, Ed.D.

January 18, 2023

Sumter County School District

Date January 18, 2023

Purchase Order information, please include PO or specify when returning this signed page to info@baileyarch.com how the PO will need to be broken out for invoicing and contact invoices will need to be sent to monthly.

Printed Name Anthony L. Gardner and Jackie Meeks

Email for Invoices agardner@sumter.k12.al.us jmeeks@sumter.k12.al.us

Request for Taxpayer Identification Number and Certification

► Go to www.irs.gov/FormW9 for instructions and the latest information.

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

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Bailey Education Group, LLC		
2 Business name/disregarded entity name, if different from above		
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input checked="" type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ► _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>	
5 Address (number, street, and apt. or suite no.) See instructions. 201 Park Court STE B	Requester's name and address (optional)	
6 City, state, and ZIP code Ridgeland, MS. 39157		
7 List account number(s) here (optional)		

Part I Taxpayer Identification Number (TIN)

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

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

Social security number								
			-			-		
or								
Employer identification number								
2	6	-	1	2	9	4	5	9

Part II Certification

Under penalties of perjury, I certify that:

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

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

Sign
Here

Signature of
U.S. person ►

Date ► **1/5/2023**

General Instructions

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

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

Purpose of Form

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

- Form 1099-INT (interest earned or paid)

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

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

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

By signing the filled-out form, you:

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

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax under section 1446 on any foreign partners' share of effectively connected taxable income from such business. Further, in certain cases where a Form W-9 has not been received, the rules under section 1446 require a partnership to presume that a partner is a foreign person, and pay the section 1446 withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid section 1446 withholding on your share of partnership income.

In the cases below, the following person must give Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the entity;
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the trust; and
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person, do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a "saving clause." Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the instructions for Part II for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

Also see *Special rules for partnerships*, earlier.

What is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all United States account holders that are specified United States persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account; for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

a. **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note: ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040/1040A/1040EZ you filed with your application.

b. **Sole proprietor or single-member LLC.** Enter your individual name as shown on your 1040/1040A/1040EZ on line 1. You may enter your business, trade, or "doing business as" (DBA) name on line 2.

c. **Partnership, LLC that is not a single-member LLC, C corporation, or S corporation.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

d. **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on line 2.

e. **Disregarded entity.** For U.S. federal tax purposes, an entity that is disregarded as an entity separate from its owner is treated as a "disregarded entity." See Regulations section 301.7701-2(c)(2)(iii). Enter the owner's name on line 1. The name of the entity entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2, "Business name/disregarded entity name." If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, you may enter it on line 2.

Line 3

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

IF the entity/person on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation
• Individual • Sole proprietorship, or • Single-member limited liability company (LLC) owned by an individual and disregarded for U.S. federal tax purposes.	Individual/sole proprietor or single-member LLC
• LLC treated as a partnership for U.S. federal tax purposes, • LLC that has filed Form 8832 or 2553 to be taxed as a corporation, or • LLC that is disregarded as an entity separate from its owner but the owner is another LLC that is not disregarded for U.S. federal tax purposes.	Limited liability company and enter the appropriate tax classification. (P= Partnership; C= C corporation; or S= S corporation)
• Partnership	Partnership
• Trust/estate	Trust/estate

Line 4, Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space in line 4.

- 1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2)
- 2—The United States or any of its agencies or instrumentalities
- 3—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities
- 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities
- 5—A corporation
- 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or possession
- 7—A futures commission merchant registered with the Commodity Futures Trading Commission
- 8—A real estate investment trust
- 9—An entity registered at all times during the tax year under the Investment Company Act of 1940
- 10—A common trust fund operated by a bank under section 584(a)
- 11—A financial institution
- 12—A middleman known in the investment community as a nominee or custodian
- 13—A trust exempt from tax under section 664 or described in section 4947

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 7
Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 4
Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5 ²
Payments made in settlement of payment card or third party network transactions	Exempt payees 1 through 4

¹ See Form 1099-MISC, Miscellaneous Income, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) written or printed on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37)

B—The United States or any of its agencies or instrumentalities

C—A state, the District of Columbia, a U.S. commonwealth or possession, or any of their political subdivisions or instrumentalities

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i)

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i)

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state

G—A real estate investment trust

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940

I—A common trust fund as defined in section 584(a)

J—A bank as defined in section 581

K—A broker

L—A trust exempt from tax under section 664 or described in section 4947(a)(1)

M—A tax exempt trust under a section 403(b) plan or section 457(g) plan

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, write NEW at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/Businesses and clicking on Employer Identification Number (EIN) under Starting a Business. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or SS-4 mailed to you within 10 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))	The grantor [*]
For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee

For this type of account:	Give name and EIN of:
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulations section 1.671-4(b)(2)(i)(B))	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name and you may also enter your business or DBA name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships*, earlier.

***Note:** The grantor also must provide a Form W-9 to trustee of trust.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information such as your name, SSN, or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

Victims of identity theft who are experiencing economic harm or a systemic problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to phishing@irs.gov. You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration (TIGTA) at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at spam@uce.gov or report them at www.ftc.gov/complaint. You can contact the FTC at www.ftc.gov/idtheft or 877-IDTHEFT (877-438-4338). If you have been the victim of identity theft, see www.IdentityTheft.gov and Pub. 5027.

Visit www.irs.gov/IdentityTheft to learn more about identity theft and how to reduce your risk.

Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

January 05, 2023

Good morning Dr. Gardner;

In accordance with the stipulations outlined by the *Supplemental Funding Program* for school-based COVID-19 screening program, the schools are free to utilize these funds for staffing and other costs associated with activities associated with providing school-based COVID-19 testing services coordination, mitigation, and prevention. Per our conversation, during our ZOOM Meeting with Nurse Ryans and I, pertaining to the utilization of these funds, and in addition to the school nurse's earlier proposal, we offer the additional proposal below:

- I. That **each** school nurse will be allowed \$5000 to purchase COVID related supplies for health rooms at their respective schools.
- II. Additional Water Dispensers, water and supplies be purchased for each school.
- III. Each Principal be given \$25,000 per school to purchase COVID-19 related supplies for their respective school (Possibly contract with a cleaning service).

Total Budget: \$150,000

Disbursement	Amount
Nurses Supplement	\$21,000
Health Room Supplies	\$20,000
Water Dispenser, etc.	\$9,000
Schools (Principal)	\$100,000
TOTAL	\$150,000

Thanking you in advance for your consideration of the above-mentioned proposal.

Respectfully,

Carolyn M. Gosa, RN, MSN
Health Services Coordinator

Good morning Dr. Gardner,

Sumter County school nurses have been diligent in helping to mitigate the spread of COVID-19 in our schools. We have worked relentlessly to safeguard the health and safety of our students and school staff. We have organized, coordinated and assisted with COVID-19 Testing that are conducted, weekly, at all school sites by: UAB COVID Testing in AL K-12 Schools Program since Fall of the 2021 School Year. Because of our participation our school district is eligible to receive funding to supplement costs associated with providing these school-based COVID-19 testing services. Schools may use these funds for “labor and other costs associated with increasing screening testing and support for related prevention strategies within the K-12 schools”. Additionally, school districts may utilize these funds for staffing and other costs associated with activities surrounding school-base COVID-19 testing, mitigation, and prevention. Since **August 2022**, Sumter County school nurses have coordinated and facilitated COVID-19 Testing, weekly, for **475** students. Below is a detailed breakdown:

School	Student Participating	Number of COVID-19 Test	Number of Positive COVID-19 Cases
LJHS	186	1757	17
YWEJHS	136	1327	08
KJHS	102	1014	08
SCHS	51	180	06
TOTAL	475	4278	39

With this detailed information in hand, please receive this letter as a formal request to the Sumter County Board of Education that all nurses be given a supplement out of the \$150,000 supplemental funds received in the amount listed below:

Nurse	Supplement
<i>Tasheka Ryans, RN, MSN</i> **COVID-19 Testing/Vaccination Coordinator	\$7000
<i>Carolyn Gosa, RN, MSN</i> Health Services Coordinator	\$6000
<i>Shunetta Adams, RN</i>	\$5000
<i>Jeremy Inge, RN</i>	\$3000

Thanking you in advance for your attentive consideration of this request.

Respectfully,

Carolyn M. Gosa, RN, MSN
Health Services Coordinator



COVID TESTING IN ALABAMA K12 SCHOOLS



SUPPLEMENTAL FUNDING PROGRAM FOR SCHOOLS PAYMENT DETAIL PREPARED FOR Sumter County School District

This document has been prepared for your school to provide guidance and information as pertains to the Supplemental Funding Program for which you are eligible as a participant in the COVID-19 Testing in Alabama K12 Schools program.

School-Based COVID Testing and Supplemental Funding Program

The Supplemental Fund program is designed to assist schools participating in the COVID Testing for Alabama K12 School weekly screening program administered by LUXOR. UAB SOPH has contracted with LUXOR to provide school based COVID screening services as well as to administer the Supplemental Fund payments to participating districts and schools that elect to receive these additional funds.

Participating school(s) are eligible to receive funding to supplement costs associated with providing school-based COVID-19 testing services coordination, mitigation, and prevention. This Supplemental Funding Program is optional. Supplemental Funds are available at the District Level and for individual schools (public and private). Schools program may these funds for "labor and other costs associated with increasing screening testing and support for related prevention strategies within K-12 schools."

Per the COVID-19 Mitigation Services agreement signed on 9/12/22, "*Recipients may not use funds to purchase furniture. Recipients may not use funds to purchase equipment unrelated to COVID-19 testing in schools. Recipients may not use funds for construction.*" (Exhibit B)

Supplemental Funding for Public School Districts

If a district participates in this school based COVID screening program and all K-12 schools within the district participate, the district is eligible to receive **\$40,000** in supplemental funds for the 2022-23 school year to utilize for staffing and other costs associated with activities surrounding school-based COVID-19 testing, mitigation, and prevention. Renewing districts from 2021-22 are eligible for supplemental funding at this same level, prorated based on participation in Fall 2021 and/or Spring 2022 Semesters. Private, independent and charter schools are not eligible for Public School District supplemental funds.

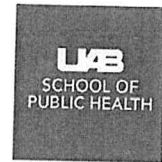
Supplemental Funding for Schools (public and private)

If a public school district or private school opts into this testing program, each participating K-12 school is eligible to receive **\$15,000** for the full 2022-23 school year to utilize for staffing and other costs associated with activities surrounding school-based COVID-19 testing, mitigation, and prevention. Renewing schools from 2021-22 are eligible for up to an additional **\$15,000** in supplemental funding, prorated based on testing program participation in Fall 2021 and/or Spring 2022 Semesters.

Right to Audit

By signing the itemized summary worksheet and accepting funds, participating districts and schools agree that these funds will only be used for allowable costs and will not be used for prohibited costs. These allowable costs include labor costs associated with the COVID-19 screening testing program and the purchase of equipment related to the COVID-19 screening testing program. Participating districts and schools may not use these funds to purchase furniture. Participating districts and schools may not use

COVID TESTING AND PREVENTION IN ALABAMA'S K-12 SCHOOLS



these funds to purchase equipment unrelated to COVID-19 testing in schools. Participating districts and schools may not use these funds for construction. The purchase of furniture, the purchase of equipment unrelated to COVID-19 testing in schools and construction are prohibited costs. UAB, the Alabama Department of Public Health, The Centers for Disease Control and Prevention and LUXOR, retain the right to audit or examine bookkeeping related to the spending of these funds and further retain the right to have a third-party audit or examine these books on their behalf.

LUXOR in partnership with UAB SOPH will:

Distribute two prorated payment installments following the Fall 2022 and Spring 2023 semesters, based on public school districts and private schools making the testing program available to all students and staff. [Renewing schools that participated in the testing program in Fall 2021 and/or Spring 2022 semesters will receive their eligible 2021-22 supplemental funds in the first of these two payment installments.]

The person signing below represents and warrants that s/he has authority to sign on behalf of the participating school receiving the funds and bind the participating school to the terms hereof and has reviewed the payment information, payable to, mailing address for the January 2023 distribution check as outlined on Page 3.

Name of Authorized Signatory: **Anthony L. Gardner, Ed.D.**

Title: **Superintendent**

Email: **agardner@sumter.k12.al.us**

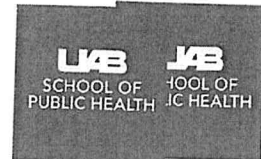
Phone: 205-652-9605

Signature: _____

Date: 12/6/2022

**KINDLY RETURN VIA EMAIL A SCANNED SIGNED COPY OF THIS 3-PAGE DOCUMENT
BY FRIDAY DECEMBER 9, 2022, TO:
Jan Bell, Program Manager, at bellej@uab.edu.**

COVID TESTING AND PREVENTION IN ALABAMA'S K-12 SCHOOLS



SUPPLEMENTAL FUND EXPLANATION January 2023 Distribution Check Information Prepared for Sumter County

Supplemental Funds are available for public school districts, charter and private schools offering weekly testing services for students and staff in 2021-22 and 2022-23 school years. Provided in this document is information regarding allowable usage of these funds as well as payment information. Please contact Jan Bell, Program Manager at bellej@uab.edu or 205-994-4989 for questions, requested changes, or other information needed.

ACTION NEEDED: To avoid any delay in processing of your January 2023 payment, please have the school district or school's Authorized Signatory acknowledge receipt by way of electronic signature and **return this signed document by Friday, December 9** via email attachment to: Jan Bell, Program Manager at bellej@uab.edu.

I. Type: ☒ Public School System ☐ Private School

II. Total Number of Schools: 4

Kinterbish Junior High School
Livingston Junior High School
Sumter Central High School
York West End Junior High School

VI. Participation: ☒ Fall 2021 ☒ Spring 2022 ☒ Fall 2022 ☒ Spring 2023

VII. Total Eligible Supplemental Funding for Your District or School: \$200,000

VIII. January 2023 Payment (2021-22 Total plus 2022 Fall Semester) \$150,000

IX. Here Is How Your January 2023 Payment Was Calculated:

2021-22 District Funds (\$20,000 per semester participation)	\$40,000
2021-22 School Funds (\$7,500 per school per semester participation)	<u>\$60,000</u>
2021-22 Total (District plus Schools for all semesters participated)	\$100,000
2022 Fall Semester Total (\$20,000 if District plus \$7,500 per school)	<u>\$50,000</u>
Total	\$150,000

X. Check will be made payable to and sent via certified delivery to:
Sumter County School District
c/o Dr. Anthony Gardner
716 Country Club Rd.
Livingston, AL 35470

ALABAMA
PUBLIC
HEALTH

UAB
SCHOOL OF
PUBLIC HEALTH



COVID TESTING

IN ALABAMA K12 SCHOOLS

Fall 2022 – Spring 2023

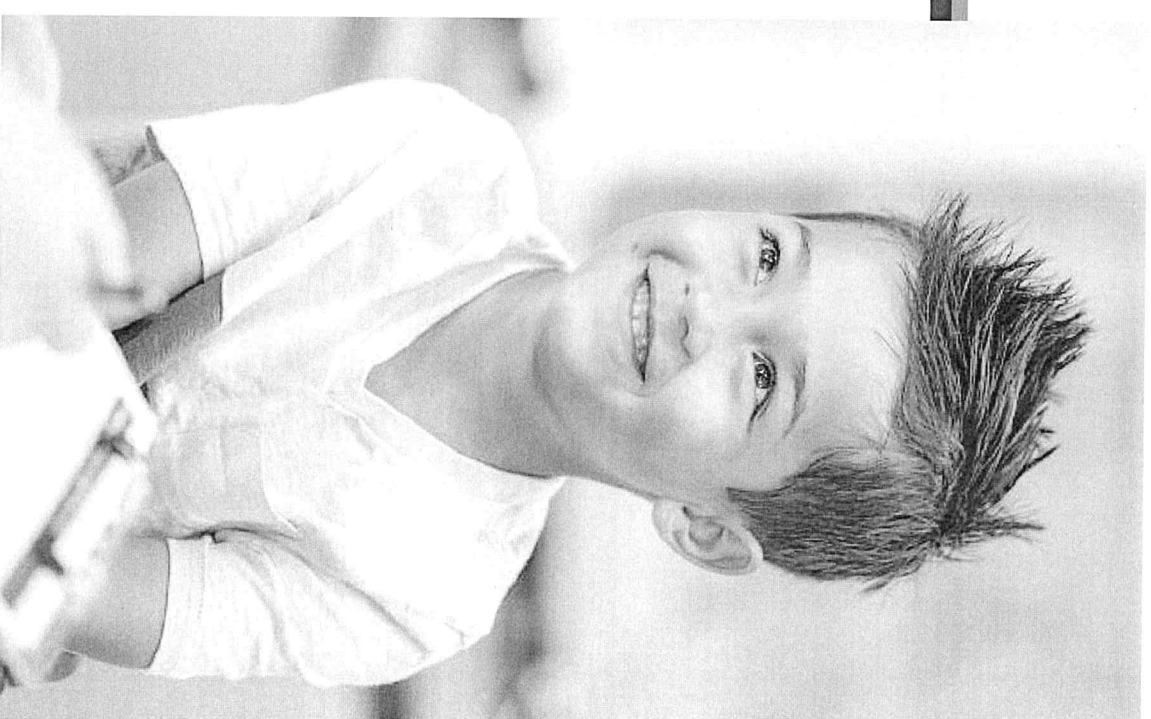


About the Program

For the second consecutive year, the UAB School of Public Health is partnering with Alabama's K-12 schools to offer free and voluntary COVID-19 mitigation efforts to students, faculty, and staff in an effort to keep schools safe and help maintain in-person learning.

In addition to weekly, on-site testing, additional services have been added to this year's program. New services include rapid tests, HEPA air purifiers, CLIA waiver assistance, rewards cards, supplemental funding programs, and providing the opportunity to have a school liaison that manages the on-site testing events, taking the burden off of school staff.

The services provided by our program are available at no cost to K-12 schools in Alabama, made possible because our program is fully funded by the U.S. Department of Health and Human Services (HHS) Federal Funds.



Goals for today's presentation

- Why is testing and mitigation important for the 2022-2023 school year?
- An overview of the services that our program is offering to every school and school district in Alabama.
- Who is eligible to participate?
- Supplemental Funding and Rewards Card Programs
- How to enroll or re-enroll for the 2022-2023 school year.

The need for ongoing testing and mitigation

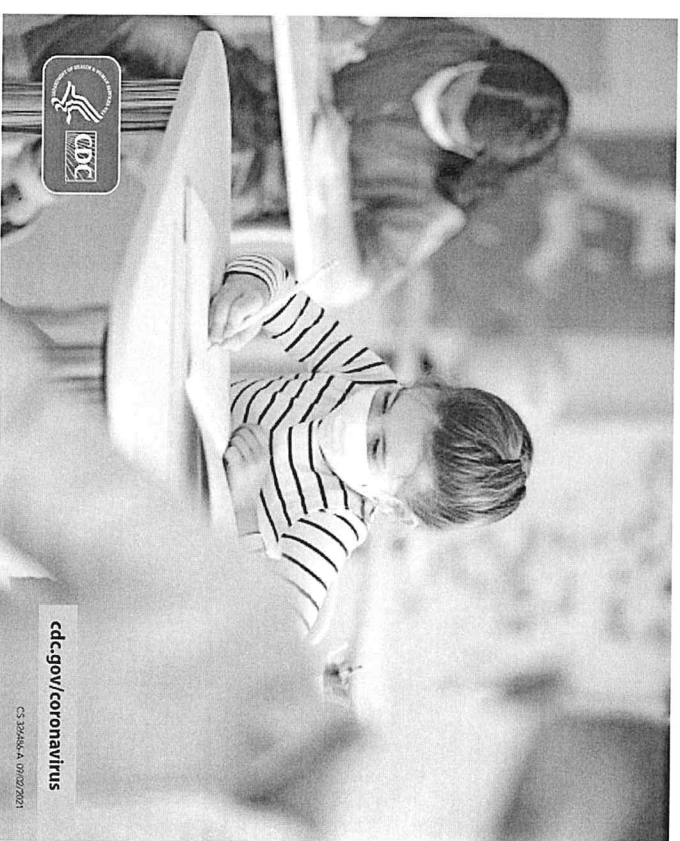
Evidence from Mathematics, supported by The Rockefeller Foundation, found that **weekly testing** of all students, teachers and staff can **reduce in-school COVID-19 infections by an estimated 50%**.

Surveys in public schools report that more than **90% of parents, students and staff support testing**.
And **70% more staff/teachers and 48% more parents report feeling confident** in the safety of in-person learning when testing programs are available.

Free services available this year

- Weekly, voluntary, on-site COVID-19 testing
- A Rewards Card program for participating students
- Supplemental funding for school districts and schools offering weekly on-site testing
- School liaisons to assist with on-site testing
- HEPA air purifiers
- CLIA/ ICL waiver assistance

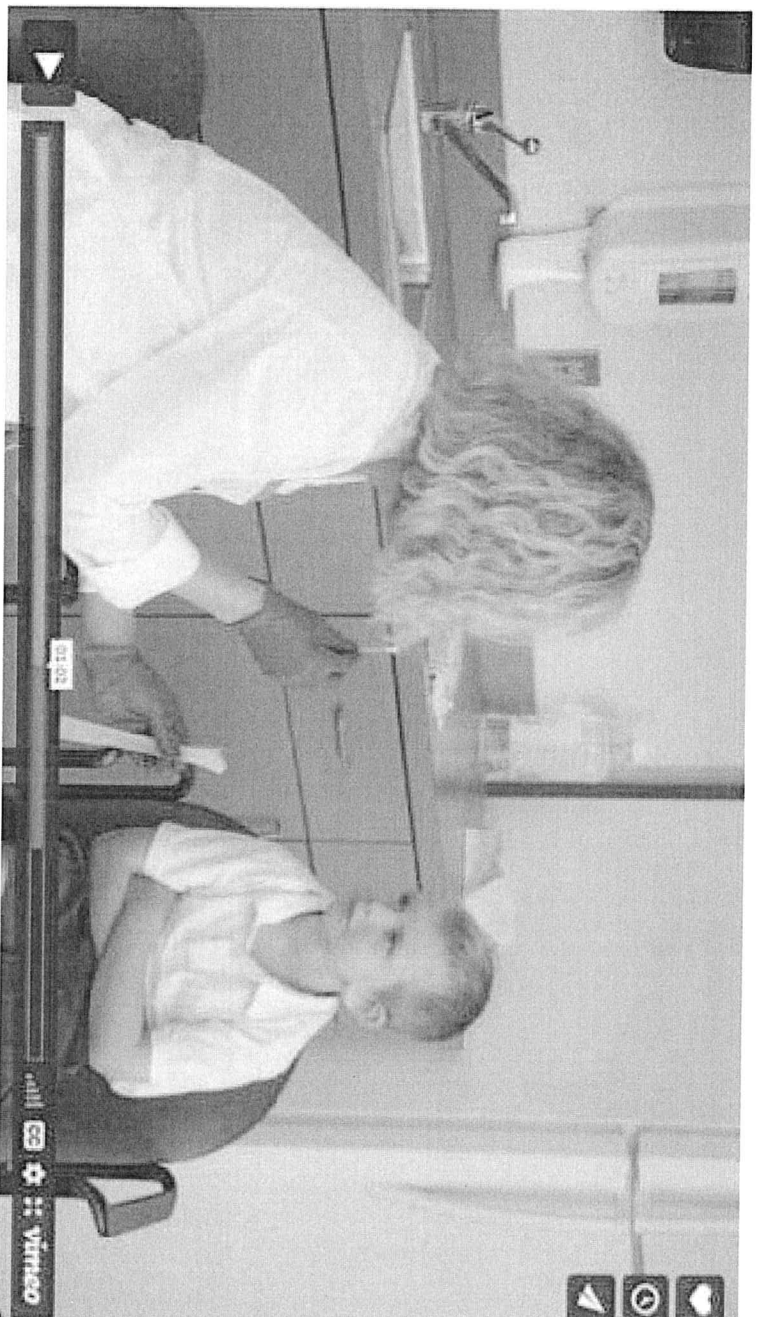
*Decisions on available services are made at the district level for public schools, and at the school level in private schools. Districts and private schools are not required to opt in for all program services to participate, rather they may choose which of the program offerings they would like to utilize from a menu of optional services available.



cdc.gov/coronavirus

CS 30466-A 09/22/2021

How weekly testing is done



<https://vimeo.com/575953558/4fcd6eca9d>

The process of the weekly testing program

COMMUNICATIONS

COMMUNICATION TEMPLATES WITH CONSENT
IN MULTIPLE LANGUAGES

SAMPLE COLLECTION

ON-SITE COLLECTION STAFF AND SCHOOL
LIAISONS TO ACCOMMODATE VARIOUS AGES
AND ABILITIES

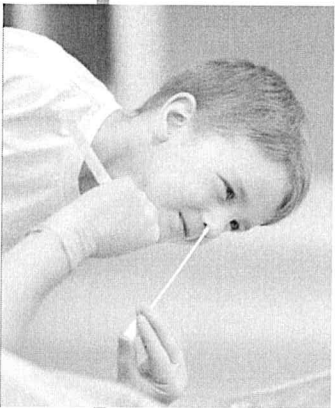
LAB PROCESSING

RT-PCR WITH TRIPLE CHECK OF POSITIVES IS A
GOLD-STANDARD TEST FOR COVID-19

RESULTS & REPORTING

OUR VENDOR WORKS TO REPORT RESULTS
WITHIN 48 HOURS OF SAMPLE COLLECTION
FOR PCR TESTS

Sample collection options and process



Shallow Nasal, Primarily

- Comfortable front-of-nose swabs, NOT the “brain” swabs.

Oral Swab & Saliva Available

- Special needs support, based on Clinical Supervisor’s evaluation.

Process for Students

- Collection Location selected by school
- Mobile cart collection option
- Centralized Station(s) options

Process for Staff

- Supervised self-collection option

Getting the word out

Program flyer and consent forms

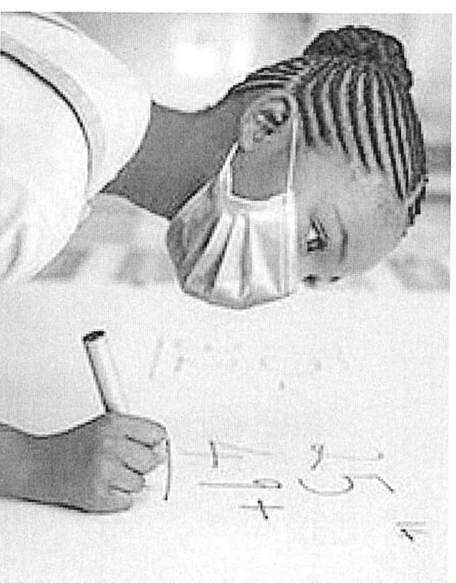
- Print and PDF available
- Available in English and Spanish (other languages as needed)

Videos (short, parents can watch with child)

- Younger children: <https://vimeo.com/580466970/86014fd766>
- Older children: <https://vimeo.com/580466987/5eac16afe6>
- Teachers: <https://vimeo.com/580466916/4804561fef>

Communications

- Email templates for school leadership to introduce the program to parents, faculty, and staff
- Program website: sites.uab.edu/covidalk12
- Social media toolkit
- Parent informational meetings (in-person and zoom)



Program offerings

FUNDING

- Supplemental Funds for School Districts
\$40,000 per District
- Supplemental Funds for Public Private, Charter Schools
\$15,000 per School
- Prorated for 2022-23
Fall and Spring Semesters

SUPPORT

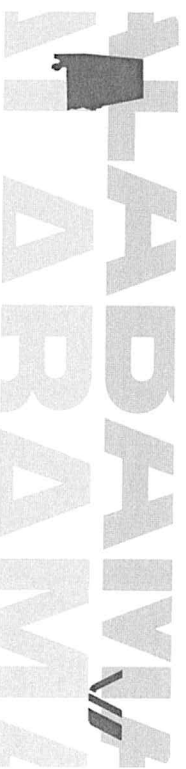
- School Liaisons
- Testing Results Portal
and Integrated Reporting
Software
- Communications
- Training and Technical
Support
- CLIA Waiver assistance

MATERIALS

- PPE and Testing Materials
- Testing Team Services
- Easy-to-use Staff and Parental
Registration
- Student Rewards Card (Optional)
- HEPA Air Filters

Rewards Cards for Students

- A Rewards Card Program is available to all students participating in weekly testing.
- Amount received per weekly test: \$15
- Rewards Cards are mailed directly to students once per month.
- Parents can opt-in or opt-out for the Rewards Card Program at any time.



IN ALABAMA K12 SCHOOLS



HEPA air purifiers

KEEPING SCHOOL AIR CLEAN

- Our program is offering up to five HEPA air purifiers to each school, with enough filters for two years.
- HEPA (High-Efficiency Particulate Air) purifiers can remove at least 99.97% of dust, pollen, mold, bacteria, and any airborne particles with a size of 0.3 microns, according to the U.S. Environmental Protection Agency.
- Priority areas that we have identified as benefiting most from portable HEPA systems are:
 - Cafeteria
 - Gym
 - Band/Choir Room
 - Special Education Classroom
 - Nurse's Office
 - Main Office
- Once identified and ordered, they will be shipped directly to your school.

Who is eligible to participate?

- All Alabama K-12 school districts
- All Alabama K-12 public, charter, private schools
- All teachers, staff, students
- School teams & school events



Enroll today!

Interested in any of these services? We are ready to help!

Next Steps:

- Complete and Return Services Interest Form.
- UAB will send a Services Agreement to the school district or private school's signatory designee to authorize provision of the services desired.
- UAB will follow-up with next steps to initiate each service requested.

Services begin!

For more information or to request a call to discuss next steps:

covidAlk12@uab.edu or visit <https://sites.uab.edu/covidalk12>



COVID TESTING
IN ALABAMA K12 SCHOOLS

Our best defense to keep classrooms open.



Sumter County Board of Education

P. O. Box 10 • Livingston, AL 35470 • 205 652-9605 • FAX: 205/652-9641

Jeanette Brassfield Payne, President
Darla Spencer, Vice-President
Beretha Washington
Sharon Nelson
Eleanor James
Lillian Wideman

TO: Board Members

FROM: Anthony L. Gardner, Ed.D.
Superintendent

RE: Strategic Planning Consultant

DATE: January 17, 2023

Board Members,

I am recommending that the Board offer a Strategic Planning Consultant Contract to Mrs. Grace Hall King in the amount of \$2,500.00. The terms of this agreement will allow Mrs. King to be responsible for spearheading the development of a five-year strategic plan for the Sumter County Board of Education. This process is a very important piece of the district wide accreditation efforts.

Thank you

"Success Is The Only Option"



Sumter County Board of Education

P. O. Box 10 • Livingston, AL 35470 • 205/652-9605 • FAX: 205/652-9641

Board Members

From: Anthony L Gardner, Ed.D.

RE: 2023-2024 Mission Statement Committee

Date: January 17, 2023

Board Members:

I am submitting the following names to serve on the Sumter County Board of Education 2023-2024 Mission Statement Committee:

Sumter County Board of Education's Mission, Value, and Beliefs Committee: The goal of this committee is to review, revise, and edit existing mission, value and belief statements or develop new statements.

Committee members:

Mr. Marcus West, Director Curriculum/Instruction

Ms. Bridgette Ward, Parent SCHS

Lajayla Davis, Student SCHS

Ms. Latoyna Johnson, Teacher SCHS

Ms. Dorothy Lake, Parent YWE

Jordyn Wade, Student YWE

Ms. Patricia Mitchell, Teacher YWE

Ms. Dequisha Epps, Parent LJHS

Noah Coleman, Student LJHS

Mr. Rashard Jemison, Teacher/AP LJHS

Brenda Evans, Parent KJHS

Kamiya Nelson, Student KJHS

Mr. Wayburn Hall, Teacher KJHS

Reverend Tyrone Thomas, Pastor

Mr. Marcus Campbell, Chairman Sumter County Board of Commissions

Grace King, Consultant

Thank You

ALG/elh

Leave-of-Absence of Personnel

ACTION AGENDA (____ New / ____ Unfinished Business)

Item: Leaves-of-Absence of Personnel

Background Information:

Item No: _____ pp

Exhibit: _____

NAME	SCHOOL/POSITION	EFFECTIVE DATE	REASON
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Certificated Leaves-of-Absence

1 .	Devante Giles	YWE/Special Education	01/17/2023-03/01/2023	Catastrophic/Unpaid Leave
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¹ Applying for Alabama certification via an alternative approach

² Certificated employee in a classified position

Recommendation: That the Board approve the leaves-of-absence of personnel listed hereinabove.

Date: January 12, 2023 Submitted by: _____

The Superintendent concurs in this recommendation and submits same for Board consideration for approval.

Date: _____ Superintendent: _____

Tuesday, January 17, 2023

Resignation of Personnel

ACTION AGENDA (____ New / ____ Unfinished Business)

Item: Retirement and Resignations of Personnel

Background Information:

Item No: _____ pp

Exhibit: _____

<u>NAME</u>	<u>SCHOOL/POSITION</u>	<u>EFFECTIVE DATE</u>
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Certificated Resignations

1 .	Alfred E Taylor	LJHS/Phy Ed	01/06/2023
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¹ Applying for Alabama certification via an alternative approach

² Certificated employee in a classified position

Recommendation: That the Board approve the retirement and resignations of the personnel mentioned hereinabove.

Date: January 12, 2023 Submitted by: _____

The Superintendent concurs in this recommendation and submits same for Board consideration for approval.

Date: _____ Superintendent: _____

Tuesday, January 17, 2023

Employment of Personnel

ACTION AGENDA (____ New / ____ Unfinished Business)

Item No: _____ pp

Item: Employment of Personnel

Exhibit: _____

Background Information:

NAME	SCHOOL/POSITION	REPLACING	EFFECTIVE DATE	CERT
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Classified

1 .	Ashley Parker	LJHS/Instructional Aid	Akesia Epps	01/12/2023
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¹ Applying for Alabama certification via an alternative approach

² Certificated employee in a classified position

Recommendation: That the Board approve the assignments as submitted hereinabove.

Date: January 12, 2023 Submitted by: _____

The Superintendent concurs in this recommendation and submits same for Board consideration for approval.

Date: _____ Superintendent: _____

Tuesday, January 17, 2023